



Infor System21 Transport Planning

Product Guide

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About this guide

The purpose of this document is to describe the functions that can be used within the Transport Planning Module.

Intended audience

The guide is intended for any users of the TP Transport Planning business module.

Related documents

You can find the documents in the product documentation section of the Infor Support Portal, as described in "Contacting Infor" on page 13.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1 Module Overview

Introduction

For many companies, transport-related costs form a significant portion of the total distribution budget. Increases in efficiency and reductions in costs due to effective planning and management of the transport department can have a real effect on a company's profits.

To optimise the utilisation of transport resources and [load](#) fill, accurate information should be made available to the transport department as early as possible in the delivery cycle. This enables efficient scheduling of deliveries in the short term as well as assisting strategic transport planning in the longer term.

The Transport Planning application provides a wide spectrum of facilities for the planning and day-to-day management of transportation.

Together with the appropriate Distribution applications, it provides the comprehensive solution for companies managing their own fleet, those using third party [carriers](#) and those using a combination of the two.

General Concepts

There are four basic methods of delivery:

- Own transport facility
- Third party transport
- Parcel service
- Collection by customer

Whichever method or combination of methods is utilised, the following operational steps may be taken to plan the necessary transport.

- Build [loads](#)
- Assign transport resource
- Manage movements

- Consign [loads](#)

Weight and [Volume](#) Calculations

Weights, [volumes](#) and [containers](#) are used extensively in Transport Planning to assist users in estimating what will go on a [load](#). The notes below show how weights, [volumes](#) and the number of [containers](#) are calculated.

Note: The weights, [volumes](#) and numbers of [containers](#) for returned goods to be picked up en-[route](#) are not included in these calculations.

Detailed [Container](#) Summary Off

If the Detailed [Container](#) Summary field is **unchecked** for a [transport centre](#), the weight and [volume](#) calculation is a simple accumulation of all entered values.

The number of [containers](#) is the number of issue units required divided by the number of [containers](#).

An example is given below:

Sample Calculation

If you set up the following details for an item:

Net weight per issue unit	= 5.00
Net volume per issue unit	= 3.00
Item tare weight per issue unit	= 0.25
Quantity per container	= 10.00
Container tare weight	= 2.00
Container volume	= 3.00

For an [order](#) line quantity of 10 issue units, the transport requirements calculated are:

Net weight	= 50 (10 @ 5.00)
Net volume	= 30 (10 @ 3.00)
Item tare weight	= 2.5 (10 @ 0.25)
Number of containers	= 1 (10 units with 10 per container)
Container tare weight	= 2.00
Container volume	= 3.00

Total Volume

Net volume + container volume	= 33.00
-------------------------------	---------

Gross Weight

Total tare weight	= Item tare weight + container tare weight	= 4.50
Gross weight	= Net weight + total tare weight	= 54.50

Volume calculations

The example above is typical where both the items and the [containers](#) have [volumes](#), e.g. bricks on a pallet. Both items and pallets have [volumes](#) which are included in the total.

If the item is contained in a [container](#), for example margarine tubs in a carton, the net [volume](#) of the item is irrelevant and should be 0 and only the [container volume](#) should be entered.

If the [container](#) is not significant, for example 6 bottles of mineral water wrapped in cling film, the [container](#) weight and [volume](#) may be left as 0.

Containers

No of containers	= No of issue units / quantity per container	= 1.0
------------------	--	-------

Detailed [Container](#) Summary On

If the Detailed [Container](#) Summary field is **checked** for a [transport centre](#), the Item Transport Detail maintenance task will allow items with [container](#) profiles to have a default outer defined. This will be used in [volume](#) and number of [container](#) calculations for these items.

An example is given below:

Weight, Volume and Number of Container Calculations

All [containers](#) must have Transport Planning item details set up. For each requirement (picked quantity on an [order](#) or outstanding quantity on a return line), the calculations are:

Weight = [net weight](#) per issue unit * number of issue units + sum of [Container tare weight](#) of all [containers](#)

[Volume](#) = number of standard outers * [container volume](#) defined on that [container's](#) transport item details.

Number of [containers](#) = number of standard outers only.

Sample Calculation

Item	Net wt per iss un	Volume per iss un	Container tare wt	Container volume	Standard outer
GIN	0.8	0	0	0	CASE
BOTTLE	0.0	0	0.6	0.75	
BOX	0.0	0	0.1	9.00	
CASE	0.0	0	0.2	108.00	
PALLET	0.0	0	1.0	0.9	

[Container](#) profile for GIN with number off

BOTTLE	1
BOX	12
CASE	240
PALLET	960

[Order](#) 100 boxes of GIN = 1200 BOTTLES

Weight

Goods	960 (1200 * 0.8)
BOTTLE	720 (1200 * 0.6)
BOX	10 (100 * 0.1)
CASE	5 (5 * 0.2)
PALLET	2 (1 * 2, 1 PALLET not full)

Total 1697

Volume

CASE	540 (5 * 108.0)
------	-----------------

No other [volumes](#) will be included.

Number of Containers

CASE	5
------	---

No other [container](#) will be included.

Note: Should any [containers](#) be sold as normal items on sales [orders](#), or returned empty, their weight and [volume](#) will be calculated as for any other item. Therefore, [container](#) items may have all normal entries on their item transport profiles.

Build Loads

When [loads](#) are being planned, be it for own transport or third party [carrier](#), decisions regarding giving extra discount or promising a delivery date and time, may depend upon access to the current situation of the [loads](#) to the customer's [area](#).

When items are planned on a [load](#), a number of factors will contribute to the decision-making. These factors fall into three categories: customer, product and [vehicle](#).

Customer Factors

- Geographical position
- Limits on [vehicles](#) accepted
- Limits on [container](#) types accepted
- [Carriers](#) accepted
- Days of the week
- Times of the day
- Authorisation required for delivery
- Exclusive deliveries

Product Factors

- Temperature control
- Security

Vehicle Factors

- Maximum [capacity](#) (weight, [volume](#), number of [containers](#))
- Driver restrictions (HGV required etc.)
- Availability of [vehicle](#) and driver

There is a requirement for a continuous view of the forward delivery [load](#). The forward view should present the requirements in the appropriate units (weight, [volume](#), number of [containers](#)) by [transport centre](#)/date/time/[route](#)/[vehicle type](#) restriction.

Typically, the day before despatch (or on the same day) the [load](#) is finalised, with the [vehicle](#) and [carrier](#) assigned. The picking and preparation documents can then be issued.

Assign Transport Resource

The procedure is obviously different for companies using their own transport and those using a third party. If you are using a third party, it is a matter of notifying the [carrier](#) of:

- [Vehicle](#) requirements
- [Loading](#) date, time and place
- [Drops](#)
- Required delivery dates and times
- Weights/[volume](#)/number of [containers](#) per [load](#)

- Product details

The [rates](#) may then be agreed as part of the confirmation. Typically, this is a specific confirmation of a long-standing agreement based on [rate](#) tables supplied by the [carrier](#), allowing transport costs to be accurately calculated, accrued and matched to [carrier](#) invoices.

If you are using your own transport facilities it is necessary, having determined the requirements, to assign a [vehicle](#) and driver. There is a continuous review of the despatch requirements to maximise utilisation and minimise the number of part [loads](#) sent out.

It is often necessary to assign more than one [carrier](#) by the creation of a [master load](#). This covers the trunking of a complete [load](#) to a [destination](#), where it is split into sub-[loads](#) which are typically delivered by local [carriers](#) on smaller [vehicles](#).

Manage Movements

This includes all of the tasks necessary to get the goods on the right [vehicle](#) at the right time and in the most efficient manner. This includes the production of any necessary paperwork:

- Picking notes
- Despatch notes
- [Load sheets](#)
- Bills of lading (consignment notes)
- Invoices

The important fact here is that the [load](#) is picked as a consignment. This might be [order](#) picked OR consolidated by [carrier](#) or [route](#) or individual [load](#) and then marshalled.

There can be different requirements for confirmation of the different movements, but normally document confirmation with exception is used. In the case of despatch notes, a clean document may be printed before the [load](#) is consigned to the [carrier](#) (particularly when third party [carriers](#) are used).

Consign Loads

Once [loaded](#), the final transport details are confirmed prior to despatch. These include:

- [Carrier](#) used
- Weight/[volume](#)/number of [containers](#)
- Date and time of despatch
- [Vehicle](#) and driver details
- Driver instructions
- Security details
- Thermostat settings (for chilled and frozen compartments)

The latter three are particularly relevant for internal transport. [Vehicle](#) details normally include registrations, whilst drivers may be identified by a short name or employee number.

Security details may include a tag number, type and colour assigned to the [vehicle](#) at despatch.

The driver will normally sign a copy of the bill of lading to confirm acceptance of the [load](#), i.e. that the [load](#) has been consigned to the [carrier](#).

Relationship to Other Applications

The Transport Planning application is a fully standardised application, and as such operates under the control of System Manager.

Transport Planning is one of the group of advanced application modules which extend the functionality of base application modules.

The applications which are prerequisite for the operation of Transport Planning are:

- Inventory Management
- Sales [Order](#) Processing

The application, however, is designed to be used in conjunction with, and enhance, the following applications:

- Advanced [Order](#) Entry
- Customer Returns
- Distribution Requirements Planning (DRP)
- EDI Application Interface
- Telesales
- Warehouse Management
- Accounts Payable
- Advanced Financial Integrator (AFI)

The Customer Returns interface allows this application to plan transport for the collection of goods from customers.

The DRP interface allows this application to plan transport for depot replenishment as well as for retail deliveries.

The EDI interface allows incoming sales [orders](#) received electronically to be made available for transport planning.

The ability to produce a consolidated pick per [load](#) (or [route](#) or [carrier](#)) is provided within Warehouse Management or using the bulk pick capability within Transport Planning for inventory stockrooms.

Once authorised, [carrier](#) invoices can be automatically transferred to the Accounts Payable invoice log.

The Advanced Financial Integrator application has the capability to post [carrier](#) charges and [payment](#) variances into the General Ledger based on user-defined rules.

Application Configuration

As with all applications, Transport Planning can be operated for a number of companies.

Within each transport company, [transport centres](#) may be set up. These are defined by assigning a number of Inventory stockrooms to the [transport centre](#). This allows the transport [planner](#) to manage transport on behalf of a number of physical depots.

The transport [planner](#) has a view of the transport requirements for each defined stockroom, but has the option to build [loads](#) on behalf of each or to amalgamate them onto combined [loads](#). The former is for shipping direct from the depots and the latter for transshipping prior to despatching from a single delivery depot.

The [transport centre](#) may also be associated with multiple sales companies, allowing the [planner](#) to manage transport across commercial companies or divisions within an organisation.

The AFI interface allows the calculated [carrier](#) freight charges and actual [payment](#) variances to be posted to multiple General Ledger companies.

Maintenance of Set Up Data

As this is an advanced application module, much of the primary data has already been set up as part of the base modules. There is, however, additional information which must be entered in [order](#) to obtain the maximum benefit from the applications.

The common ways in which this data is maintained are as follows:

- The application makes the maximum use of codes and where they are employed.
- A prompt is always available to assist in selecting the correct one.
- Selection is normally from a displayed list.

Information for the following may be maintained:

- [Transport centres](#)
- Transport [planners](#)
- [Vehicle types](#)
- [Routes](#)
- [Route nodes](#)
- [Carriers](#)
- [Carrier rates](#)

- [Areas](#) (zones)
- Item transport details
- [Delivery profiles](#)

Additional defaults are also maintained per transport company. The most important of these being the point at which the transport requirements are first created within this application from Sales [Order](#) Processing at one of the following times:

- Immediately after taking [orders](#)
- On allocating stock
- On creating a picking note
- On confirmation of despatch

Transport Centres

A [transport centre](#) represents a delivery depot, where transport [loads](#) are planned, picked and despatched.

This is defined by associating one or more stockrooms with the [transport centre](#) in the Transport Planning application.

These stockrooms may span more than one sales company, allowing multi-company planning of transport for despatches.

A number of control flags are maintained per [transport centre](#), which condition the processing of [loads](#):

Add Orders Immediately to Load

If this is set to [Orders](#) or [Orders/Returns](#) and a suitable [load](#) is found, i.e. same [route](#), date, [transport centre](#), [vehicle type](#) and sufficient [capacity](#) is available, the application will automatically add the [order](#)/return to this [load](#) when the transport requirements are created.

In effect, the application builds the [loads](#), provided that the [load](#) headers are set up in advance by the [planner](#), by-passing the Build [Loads](#) window.

If this is set to **No** and a suitable [load](#) is found, this [load](#) number is suggested to the [planner](#) on the Build [Loads](#) window.

In either case, if no suitable [load](#) is found, the suggested [load](#) is blank and the [planner](#) must create a suitable [load](#) and then add the [order](#)/return to this [load](#) by using the Build [Loads](#) window.

Allow Load to be Released before Goods Ready for Loading

The application maintains a running total of [orders](#) per [load](#) and also the number of [orders](#) confirmed as despatched (assembled) within Sales [Order](#) Processing.

If this is **unchecked**, the application will not allow [loads](#) to be released for printing of documentation unless these totals tally.

Print BoL/Loadsheets Immediately after Load Released

If this is **checked**, the [load sheet](#) and bill of lading, if required, are printed immediately after the release of a [load](#) to be processed.

If this is **unchecked**, the [load](#) will be printed in the next batch print run invoked by the user.

Bypass Confirm Load Despatch

If this is **unchecked**, each [load](#) must be confirmed as despatched.

This places a date and time stamp on the [load](#) as it leaves the depot.

Load Numbers

A sequential range of [load](#) numbers may be maintained per [transport centre](#) with a user-defined prefix. Alternatively, a single range may be maintained per transport company. When you are creating new [loads](#), the automatically-assigned [load](#) number can be overridden.

Transport Planners

For security reasons, each user of the Transport Planning application must be defined as a transport [planner](#).

This allows authorisation to one or more [transport centres](#). You are allocated a [default centre](#) in to which you are automatically logged by the application. The centre description is shown at the top of all windows.

A [planner](#) may change to any other [transport centre](#) by using the appropriate task. A list of centres to which the [planner](#) is authorised is displayed for selection.

The following control flags are maintained per [planner](#):

Release Load

If this is **unchecked**, the [planner](#) is not allowed to release [loads](#) for printing of documentation and processing.

Override Capacity Errors

If this is **unchecked**, the [planner](#) is not allowed to build [loads](#) over the capacities defined to the [vehicle type](#).

Authorise Payments

If this is **unchecked**, the [planner](#) is not allowed to transfer [carrier](#) invoices to Accounts Payable via the [Authorise Payments](#) task.

Authorise Adjustments

If this is **unchecked**, the [planner](#) is not allowed to transfer [carrier](#) invoices to Accounts Payable if there is a difference between the calculated charge and the [payment](#) amount.

Routes and Nodes

[Routes](#) must be maintained representing a journey between two geographical locations which can be undertaken by at least one [carrier](#) (internal or external).

The [route](#) is defined by a code, description and optionally an [origin](#) and [destination](#).

If specified, the [origin](#) and [destination](#) must be defined to the application as [nodes](#), i.e. geographical start and end points for the [route](#). The [origin](#) and [destination](#) will be the same if the journey starts and ends at the same location.

A default [carrier](#) and/or [ship time](#) and/or [vehicle type](#) may be maintained for the [route](#). On creating a [load](#) for this [route](#), these defaults will be added to the [load](#).

Bills of lading will normally be required for [routes](#) covered by external [carriers](#) (for internal fleet a [load sheet](#) is normally sufficient). The requirement for a BoL, its format and the number of copies are maintained per [route](#).

Note: The default [route](#) and [drop](#) sequence are then associated with delivery points via the [Delivery Profile](#) maintenance task in this application.

Vehicle Types

These may optionally be maintained if [capacity](#) checking is required or if analysis by [vehicle type](#) is considered important.

A [vehicle type](#) code and description is held together with a maximum weight and/or maximum [volume load capacity](#) assigned to it.

If a [vehicle type](#) is assigned to a [load](#), the application will output an error if any specified [capacity](#) is exceeded.

Carriers

[Carriers](#) must be maintained, whether internal or external, by associating a code and name, as well as an address, with each [carrier](#).

The following details may also be maintained for each [carrier](#):

Carrier Type

This is defined by the user in a Descriptions table.

Contact Name

This is for information only.

Phone and Fax Number

This is for information only.

SRating Required Rate Method Rate Code

This is for external [carriers](#) in particular. The parameters to [rate](#) the [load](#), i.e. calculate transport charges, are specified here.

These may be overridden once a [load](#) has been created.

Payables Account

If Accounts Payable is installed, a valid supplier account is specified to allow a matched [carrier](#) invoice to be transferred from this application onto the Accounts Payable invoice log.

Carrier Routes

If validation of [carrier/route](#) combinations is required, the [routes](#) each [carrier](#) covers are defined here, together with any [route](#)-specific [rating](#) parameters.

Text

Any [carrier](#)-specific details may be maintained for the transport [planner's](#) information.

Carrier Rates

If [rating](#) of [loads](#), i.e. calculation of [carrier](#) freight charges, is to be performed by this application, sets of [rates](#) must be maintained (and associated with [carriers](#)).

Each set of [rates](#) is associated with a code and also an expiry date. Future [rates](#) may be set up to be used automatically when current [rates](#) expire.

Four methods of [rating](#) are available:

- A charge based on the [load gross weight](#), maintained in a table
- A [surcharge](#) value or percentage may be specified on top of this table value to accommodate unforeseen charges (e.g. government fuel tax increase).
- A fixed [rate](#) per [drop](#) is also applied, with a minimum/maximum [drop charge](#) for the whole [load](#).
- A minimum [load](#) charge is used if the final value is less.
- The same as for 1, except that the charge is based on the [gross weight](#) of each [drop](#)
- A charge based on the [gross weight dropped](#) into each [area](#) contained in the [load](#)
- For each [area](#) the following are maintained:
 - Fixed charge per unit of weight
 - [Surcharge](#) value or percentage
 - [Drop](#) minimum charge
 - [Drop](#) maximum charge
 - [Area minimum](#) charge
- As for 3, except that the charge per [area](#) is not fixed but maintained in a table based on [gross weight](#)

Note: Each of the [rating methods](#) may be based on [load volume](#) or total number of [containers](#) rather than [load gross weight](#).

Areas

[Areas](#) can be defined by a code and description to allow the application to group [load drops](#) into [areas](#) (or zones).

The [area](#) code is then assigned to the appropriate delivery points, allowing [load](#) documentation and [rating](#) to be split by [area](#).

Item Transport Details

Additional item details must be maintained to allow this application to calculate the [capacity](#) requirements of each item.

The following details are maintained per item:

Net Weight per Issue Unit

Weight of the goods, expressed in a standard unit of weight, per selling unit

Volume per Issue Unit

[Volume](#) of the goods per selling unit

Item [Tare Weight](#) per Issue Unit/Percentage of [Net Weight](#)

Used to calculate the [tare weight](#) of any inner pack or shrink wrapping, expressed as a weight or a percentage of the goods [net weight](#)

Quantity per Container

The number of issue units which will fill a default [container](#) (pallet, case, drum, keg etc.) for the item

Container Tare Weight

The [tare weight](#) of the default [container](#)

Container Volume

The [volume](#) of the default [container](#)

At least one of the capacities must be specified.

Delivery Profiles

Delivery Profiles

[Delivery profiles](#) can be set up for each customer delivery point.

Default [delivery profiles](#) can also be set up for each stockroom from which goods are sourced, to enable transport to be planned for all [orders](#) placed against that stockroom, irrespective of whether a specific customer delivery point has an associated [delivery profile](#).

The following details are maintained:

Default Route Default Drop Default Carrier

These details are defaulted and recorded against each [order](#) for this delivery point.

Area

This is the [area](#) or zone used for splitting the [drops](#) for documentation and [rating](#) purposes.

Customer Exclusive Loads

If this is **checked**, the application will ensure that any [load](#) built for this customer will not contain [orders](#) for other customers (based on the eight-character customer account and three-character delivery sequence).

Confirm Delivery Time Slot

If this is **checked**, the [planner](#) will be informed that this delivery point requires confirmation of a delivery slot at the customer's depot before the [load](#) can be released.

Note: Delivery [time slots](#) cannot be maintained against a stockroom [delivery profile](#).

Deliveries Allowed

These are the days of the week and the times within each day when the customer accepts deliveries. (They are used for memo purposes only).

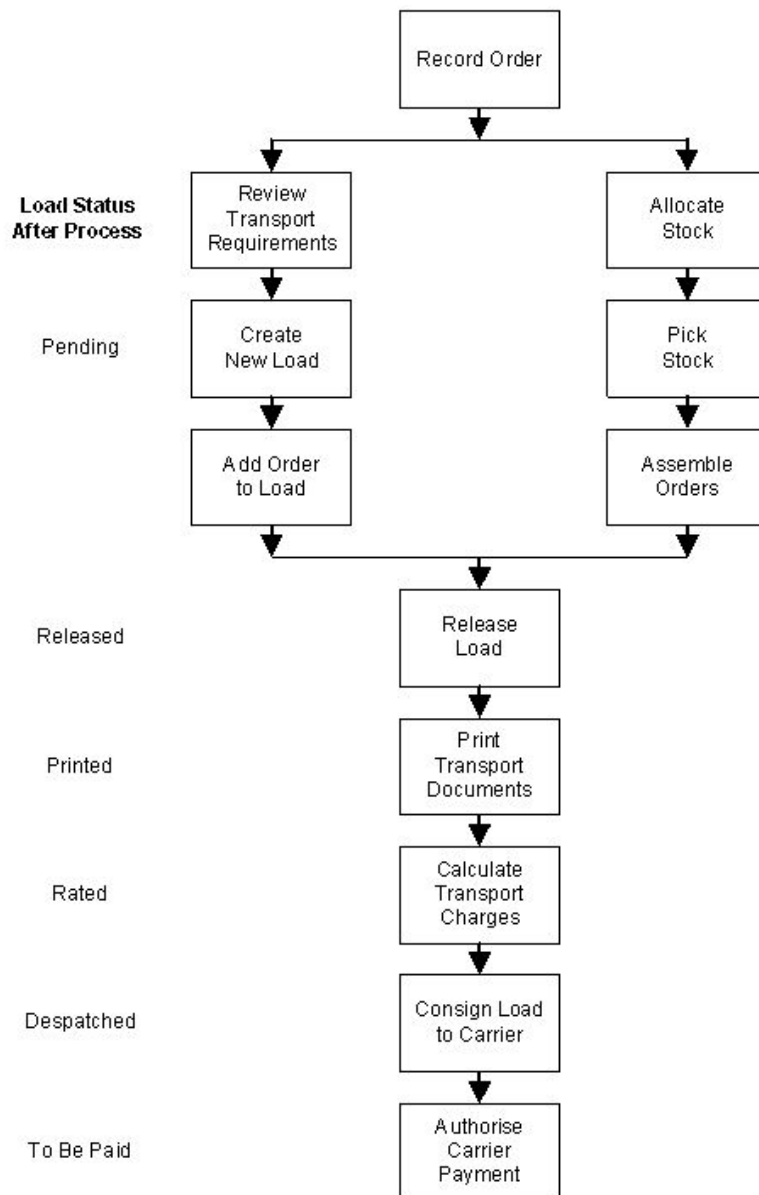
Text

Any text relevant to the transport [planner](#) can be maintained against the delivery point (for internal purposes only).

Note: Text cannot be maintained against a stockroom [delivery profile](#).

Processing

The business processes are best represented by the following flow diagram:



However, the full flexibility of the Transport Planning application requires further explanation.

The transport requirements of [orders](#) may be transferred from Sales [Order](#) Processing immediately after taking the [order](#), on allocation of stock, creation of pick notes or on confirmation of despatch. Any under/over pick or despatch confirmation will be automatically reflected in the Transport Planning application.

The building of [loads](#) may be automated, if required, for specific [transport centres](#). The transport [planner](#) need only to create the [pending load](#) headers in advance and the application will then add the appropriate [orders](#) (up to any specified maximum capacities defined for the [vehicle type](#).)

The consignment of [loads](#) to the [carrier](#) may be done manually, via the Confirm Despatch of [Load](#) window, or automatically via the application after printing (and [rating](#) where appropriate) the [load](#).

The matching and authorisation of [carrier](#) invoices is only required where the [load](#) has been previously [rated](#).

At the appropriate point, the [load](#) is closed and copied to history for future analysis.

Review Transport Requirements

In Transport Planning, the Build [Loads](#) window presents the [planner](#) with all of the information necessary to assemble [orders](#) onto [loads](#) in the best possible way.

Once an [order](#) has been recorded, the following details are made available via the Build [Loads](#) window:

- [Gross weight](#)
- [Volume](#)
- Number of [containers](#)
- Sourcing stockroom
- Default [route](#) and [drop](#) sequence
- Default [carrier](#)
- Default [vehicle type](#)
- [Ship date](#) and time
- Customers name and account
- Suggested [load](#) number (if any)

Easy access is also provided via the following functions to provide more detail for the [load planner](#):

- [Pending loads](#) (i.e. [loads](#) not yet released)
- [Load](#) details enquiry
- [Order](#) enquiry
- [Delivery profile](#) enquiry

The [planner's](#) attention is brought to [orders](#) having fixed or special instructions by a flashing asterisk against an [order](#) which has external text recorded against it.

In addition, an asterisk is displayed against the customer if there are any delivery restrictions.

The [order](#) may then be selected to display either the [Order](#) Enquiry or [Delivery Profile](#) Enquiry respectively.

Create New Load

New [load](#) headers may be created individually on line or en masse via a batch function.

The application can automatically generate [load](#) numbers or they can be manually controlled.

The minimum amount of information required is a valid [route](#) code and [ship date](#).

[Skeleton load](#) headers may be set up to represent a standard journey and the relevant one copied each time a [load](#) is created.

A [load](#) header may be created in flight during [load](#) building if it has not been set up in advance.

Add Orders to Load

On the Build [Loads](#) window, the [planner](#) can select a number of [orders](#) to be added to a new or existing [load](#).

If a [vehicle type](#) has been specified, the application will check that its [capacity](#) has not been exceeded.

Facilities are provided to move the [order](#) to alternative [routes](#) and/or to re-sequence the [drops](#).

Once [orders](#) are added to [loads](#), they are automatically removed as a requirement from the Build [Loads](#) window.

Release Load

Prior to releasing a [load](#), any final amendments are made to [drops](#) via the Maintain [Load](#) window. In addition, any driver, [vehicle](#) registration or security seal details may be assigned to the [load](#).

On releasing a [load](#), the necessary transport documentation can be printed immediately or the next time a print run is selected.

Once released, a [load](#) is no longer available for planning. Its status must be returned to [Pending](#) by the [planner](#) for any details to be amended prior to the [load](#) being consigned to the [carrier](#).

Print Transport Documents

[Load sheets](#), and optionally bills of lading, are printed for each [released load](#). These are described in detail in the Reports section of this product guide.

Details of the [route](#), [drop](#) and [load](#) are printed on each pick/despatch note in Sales [Order](#) Processing and the notes can be generated for a specific [carrier](#), [route](#) or [load](#).

If Warehouse Management is installed, facilities are provided to produce consolidated pick lists for the warehouse personnel to pick efficiently for [loading](#) of [vehicles](#).

Calculate Transport Charges

Function is provided within Transport Planning to calculate the expected [carrier](#) charge for selected [loads](#).

The calculations are based on the following parameters:

- Charge per [capacity](#) unit ([gross weight](#), [volume](#), [containers](#))
- [Penalty](#) charge (if below specified minimum)
- Charge per [drop](#)
- Minimum [drop charge](#)
- Maximum [drop charge](#)
- [Surcharge](#) value/percentage
- Minimum charge per [area](#)
- Maximum charge per [area](#)
- Minimum charge per [load](#)

The charge [rates](#) (per unit or per [drop](#)) may be maintained as a fixed amount or in a table based on weight, [volume](#) or number of [containers](#).

Four methods of automatic calculation are available (which can each be based on [volume](#) or number of [containers](#) rather than [gross weight](#)):

- A charge based on the [load gross weight](#), maintained in a table
- A [load](#) charge based on the sum of [drop charges](#) which in turn are based on [drop gross weight](#), maintained in a table
- A charge based on a fixed unit [rate](#) multiplied by the [gross weight dropped](#) into each [area](#) (zone) contained in the [load](#)
- As above except that the charge per [area](#) is based on a table of [gross weight](#) ranges, rather than a fixed [rate](#)

If Advanced Financial Integrator is installed, the ability to post the calculated charges (prior to [payment](#)) into the General Ledger is provided, allowing selected P & L and accrual accounts to be debited and credited respectively.

Note: *The General Ledger journals may be posted based on user-defined attributes of the [load](#), customer, product and [carrier](#). The value may be apportioned over the products contained in a [load](#), based on [gross weight](#), [volume](#) or number of [containers](#) (pallets, cases, kegs, drums etc.)*

Consign Load to Carrier

An option is provided for each [load](#) to be confirmed as despatched to ensure that it is date and time stamped on leaving the depot.

This stage may be bypassed, allowing the [load](#) to be consigned automatically once the [load sheet](#) has been printed.

Authorise Carrier Payment

A [carrier](#) invoice can be matched on receipt against the calculated charge for one or more [loads](#).

If there is a discrepancy, only authorised users can authorise the [payment](#). Once authorised, the invoice and [load](#) details are automatically transferred to the invoice log in Accounts Payable (if installed).

If Advanced Financial Integrator is installed, the General Ledger can be updated with any variances between the [rated](#) and paid values.

Confirm Collection of Returned Goods

If you are using the Customer Returns interface to Transport Planning, an option is provided to acknowledge the pick-up or otherwise of goods on a return note.

This stage is bypassed if there are no planned pick-ups on a [load](#).

Enquiries

Enquiries can be grouped into one of three categories:

- Planning
- Static information
- Status

More simply, these can be regarded as:

- What is to be done?
- What are the parameters?
- Where are things?

Planning Enquiries

The [Outstanding Loads](#) Enquiry displays all [orders](#) yet to be included on [loads](#) which satisfy the selection criteria.

This can also provide visibility of the future outstanding requirements for planning of transport, as a range of dates may be selected.

Static Information

Enquiry windows are available for the following:

- [Carrier](#) details
- [Carrier/route](#) restrictions
- [Delivery profile](#) details
- Delivery [time slots](#)

Status Enquiries

[Load](#) enquiry windows are provided as follows:

- [Pending loads](#) (i.e. list of [loads](#) not yet released)
- [Load](#) details ([load](#) header information)
- [Load drops](#) (all [drop](#) details for selected [load](#))
- [Load orders](#) (all [orders](#) for selected [load](#))
- [Load consignee](#) ([consignee](#) details for selected [load](#))
- [Load](#) totals (quantity/value totals for selected [load](#))

The [Loads](#) by [Order](#) enquiry allows the current status of an [order](#) to be viewed i.e. the [load](#)(s), if any, to which it is assigned. Direct access to the [load](#) enquiries is provided by selecting one of these [loads](#).

Reports

As part of the general policy of the applications before a report is run, selection and sequencing parameters are available.

In general, standard reports are printed on standard listing with 132 print positions and 6 lines to the inch and within this application all reports and documents are defined to Report Generator for ease of amendment.

All reports are printed with the procedure or program number in the top left-hand corner and the page number and date of run in the top right-hand corner of the report.

Planning/Status Reports

The [Load](#) Status report provides a summary per date/[route](#) of the total [capacity](#) requirements of outstanding [orders](#) together with a view of any current [loads](#). From this report, the [planner](#) can quickly establish which [routes](#) are under/over committed prior to building [loads](#) on the window.

The Outstanding [Orders](#) report provides details of all [orders](#) yet to be included on [loads](#), sequenced by [route/drop](#) within date. This provides the [planner](#) with detailed [capacity](#) requirements, which are of particular use where an over commitment has been identified on the [Load](#) Status report.

The [Load](#) Details report details all the [drops](#) and [orders](#) for selected [loads](#).

Documents

Print and re-print facilities are available for two documents:

Load Sheets

These are printed for all [released loads](#) (including [master loads](#)). The [load sheet](#) provides a list of all [drops](#) to be undertaken for each [load](#) selected (in ascending or descending [drop](#) sequence). It serves three major purposes:

- 1 A marshalling document for all despatch notes included on the load sheet, particularly if the notes are from more than one stockroom
- 2 An aid to loading the vehicle in the best sequence for dropping
- 3 An action and confirmation list for the driver

Bills of Lading (BoL)

This is a more formal document than the [load sheet](#) and is normally produced only for selected external [carriers](#).

The BoL is printed in any one of four formats:

1	One BoL is printed per load	One totals line	List of despatch note numbers
2	One BoL per drop /delivery point	One totals line	List of despatch note numbers
3	One BoL per load	One totals line per drop	List of despatch note numbers per drop
4	One BoL per load	One totals line per area	List of all despatch note numbers on the load

Financial Integrator Interfaces

The following functions relate to the [areas](#) of data extraction via the AFI:

1 Rating

Manual/[automatic rating](#) will create charge details for [loads](#) that are then available for AFI extraction for accrual accounting of transport costs.

2 2Payment

[Payment](#) authorisation (manual or with Accounts Payable attached) updates charge details with [payment](#) information and transfers the invoice details to Accounts Payable. Any variances between [rating](#) and [payment](#) values can be posted to GL via AFI.

3 3Load Cancellation

[Load](#) cancellation where [loads](#) have been [rated](#) but not extracted by the AFI will create a [rating](#) posting and a subsequent [rating](#) cancellation posting when being extracted by AFI. Where the [rating](#) posting has been extracted by AFI, only a [rating](#) cancellation posting is created. For [loads](#) where [rating](#) has not taken place, no AFI extraction will take place.

Prerequisites

Applications

For the basic operation of the Transport Planning module, the following applications must be installed:

- System Manager
- Inventory Management
- Sales [Order](#) Processing

The following additional applications make up the full complement of [order](#) capture modules which provide an interface into Transport Planning:

- Advanced [Order](#) Entry
- Distribution Requirements Planning (DRP) - for distribution [orders](#)
- Customer Returns
- EDI Application Interface
- Telesales
- Warehouse Management

The following financial modules provide for a full level of financial integration:

- Accounts Payable
- General Ledger
- Advanced Financial Integrator

Data

Items

All items to be processed by Transport Planning must be defined to an associated sales/inventory stock holding company.

Customers

All delivery points to be processed by Transport Planning must be defined to an associated sales company.

Stockrooms

If you want to ensure that all goods shipped from a particular stockroom are processed by Transport Planning irrespective of whether a delivery point exists for a customer delivery point, set up a default [delivery profile](#) for the stockroom.

Transport Planning Configuration

Data Considerations

Consider the following data entities during data set up:

- Transport descriptions in Inventory
- Company profile
- [Transport centres](#)
- [Planners](#)
- [Areas](#)
- [Routes](#) and [nodes](#)
- [Vehicle types](#)
- [Carriers](#)
- Items
- [Delivery profiles](#)

Transport Descriptions File Entries

To enable the normal processing of the application, there are some entries which need to be defined to the Inventory Descriptions file.

Note: *The Inventory Descriptions file entries are maintained in Inventory Management under the default sales company defined to the Transport company profile. This enables the definition of a Transport company that need not be an existing Sales company.*

The following codes must be present:

CODE	DESCRIPTION
------	-------------

TPAR	Adjustment reason
TPBL	Bill of lading format
TPCC	Commodity code
TPCT	Carrier type
TPCY	County
TPDC	Capacity
TPIC	Creation of transport req.
TPLS	Load status
TPPM	Freight payment method
TPRM	Rating method
TPSE	Serious errors
RSNC	Reason code
TTYP	Text type
USGC	Text usage code
WAIT	Record lock wait

Low Level Codes

With the description identity codes, various low level codes must be defined:

TPBL

Bill of lading format (code length=2)

01	One document per load
02	Document per drop /delivery point
03	One document with drop details
04	One document details by area

TPDC

[Capacity](#) (code length=1)

- 1 Weight
- 2 [Volume](#)
- 3 [Containers](#)

TPIC

Creation of transport req. (code length=1)

- 1 [Order](#)/Return creation
- 2 [Order](#) Allocation/Return authorisation
- 3 Pick/Return print
- 4 Commit (not used)
- 5 Confirm pick (not used)
- 6 Confirm despatch/Return print

TPLS

[Load](#) status (code length=2)

- 10 [Pending](#) (on hold, being planned)
- 20 Aprinting (awaiting printing)
- 30 Allocated (not used)
- 40 On pick (not used)
- 50 Picked (not used)
- 60 Arating (awaiting [rating](#))
- 70 ACOD (awaiting confirmation of [load](#) despatch)
- 75 ACOR (awaiting confirmation of returns)
- 80 Aauth.pay (awaiting [payment](#) authorisation)
- 90 Aledg.post (awaiting posting of [payment](#) to the General Ledger)

95 Ahist (awaiting [drop](#) to history)

99 Cancelled

TPRM

[Rating method](#) (code length=2)

01 [Load](#) and [rate](#) table

02 [Drop](#) and [rate](#) table

03 [Area](#)

04 [Area](#) and [rate](#) table

TPSE

Serious errors (code length=2)

01 Sales [order](#) not found

02 Pick note header not found

03 Item record not found

04 Stockroom balance not found

05 [Route](#) specified not found

06 Time out for requirements update

07 Details changed after AFI posting

08 Details changed after override

09 Global [route](#) change warning

10 Possible [capacity](#) problems

11 Item transport profile not found

ITYP

Text type (code length=1)

K [Carrier](#)

C Customer

O [Order](#)

T Transport [load](#)

USGC

Text usage (code length=1)

I Internal

P [Planner](#)

E External

Text Type/Usage Combinations

KI Internal [carrier](#) text

CP [Planner](#) customer text

OE External [order](#) text

TE External transport [load](#) text

WAIT

This is the wait type for temporary record locking (code length=6)

BATCH Batch lock request

BATCH entry should be defined with a limit of 5 for the record lock attempts and a [rate](#) of 20 for the wait seconds.

INTER Interactive lock request

INTER entry should be defined with a limit of 5 for the record lock attempts and a [rate](#) of 2 for the wait seconds.

Note: The *WAIT Description Identity* is used to control how long a job should wait for a temporary record lock to be released and how many retries should be effected to achieve a lock for updates.

Company Profile

The Transport Planning company profile defines a number of primary defaults. The following issues should be considered:

- When should transport requirements initially be received from Sales [Order](#) Processing?
- Should transport [load](#) references be created at company or [transport centre](#) level?
- What are the significant decimal places for each of the [capacity types](#) i.e. weight, [volume](#) and number of [containers](#)?
- [Order](#) planning level, i.e. header or line detail. This determines if the stockroom code at header or line level is used to determine the [transport centre](#) into which the [order](#) line requirements are to be placed.

Transport Centres

[Transport centres](#) define a delivery depot that will process [order](#) requirements and [loads](#). The following issues should be considered:

- How many [transport centres](#) should be defined for the company?
- How many inventory stockrooms should be associated with each centre?
- Should these stockrooms span sales companies i.e. should multiple company planning by a single centre be allowed?
- What is the default [capacity type](#) for the centre (weight, [volume](#) or number of [containers](#)) to be shown on windows when first displayed?
- Should requirements be assigned to [loads](#) on initial creation i.e. bypassing manual [load](#) build and allowing the system to automatically add them to suitable [loads](#)?
- Should [loads](#) be available for release prior to all the [orders](#) assigned to the [load](#) being confirmed as despatched?
- Should transport documentation be printed online on releasing the [load](#)?
- Is confirm of [load](#) despatch required?

Planners

All users of the application must have a [planner](#) profile defined. The following issues should be considered:

- Should [planners](#) be authorised to plan [loads](#) across a number of [transport centres](#)?
- What level of authorisation should be assigned i.e. release [loads](#), [capacity](#) overrides, [payment](#)/adjustment authorisation?

Areas

[Areas](#) or zones need to be defined for the purpose of [rating](#) and documentation. Consideration should be given as to how these [areas](#) are to relate to a [transport centre](#), i.e. geographical location or a radial pattern.

Routes and Nodes

All [routes](#) must be defined to the application together with optional start and end points. The following issues should be considered:

- Are internal or external [carriers](#) associated with [routes](#)?
- Are [vehicle types](#) a factor, i.e. do certain [vehicle types](#) run on particular [routes](#)?
- Are [origins](#) and [destinations](#) applicable, i.e. movement between two locations rather than a circular trip back to the [transport centre](#)?
- Is formal documentation required for each [route](#), i.e. a bill of lading, or is a [load sheet](#) sufficient?

Vehicle Types

[Vehicle types](#) need only be defined if analysis of transport requirements against [vehicle](#) capacities is required. The following issues should be considered:

- Internal and/or external types (as defined by [carriers](#)).
- Are discrete weight and [volume](#) capacities important (these may be set as infinite requiring manual review/control of [load](#) capacities)?

Carrier Types

All [carriers](#) must be defined to the application. The following issues should be considered:

- Internal transport or external [carrier](#) services.
- Is [rating](#) applicable?
- Are there any [carrier route](#) and/or [rating](#) restrictions?

Carrier Rates

[Carrier rates](#) need only be defined if calculation of transport charges is applicable for the business. This is generally only a feature of external transport of goods and [rates](#) will generally be communicated on a contract basis via the [carrier](#). The following issues should be considered:

- Which of the four methods are appropriate?
- How many [rate codes](#)/effectivity dates are to be defined?

Note: *Potentially a large amount of data may be required.*

Items

Item details should be reviewed in [order](#) to assess [capacity](#) requirements for their transportation. The following issues should be considered:

- [Net weight](#) and [volumes](#) associated per item issue unit
- [Tare weights](#) (per issue unit or percentage of [net weight](#)) for any item wrappings
- Quantity per default [container](#)
- [Container tare weight](#) and [volume](#)

Delivery Profiles

All customer and distribution centre delivery points must be defined to the application. The following issues should be considered:

- [Route](#) and [drop](#) sequence
- Default [carrier](#)
- Exclusivity of [loads](#) to the customer
- Delivery confirmation and [time slots](#) requirements

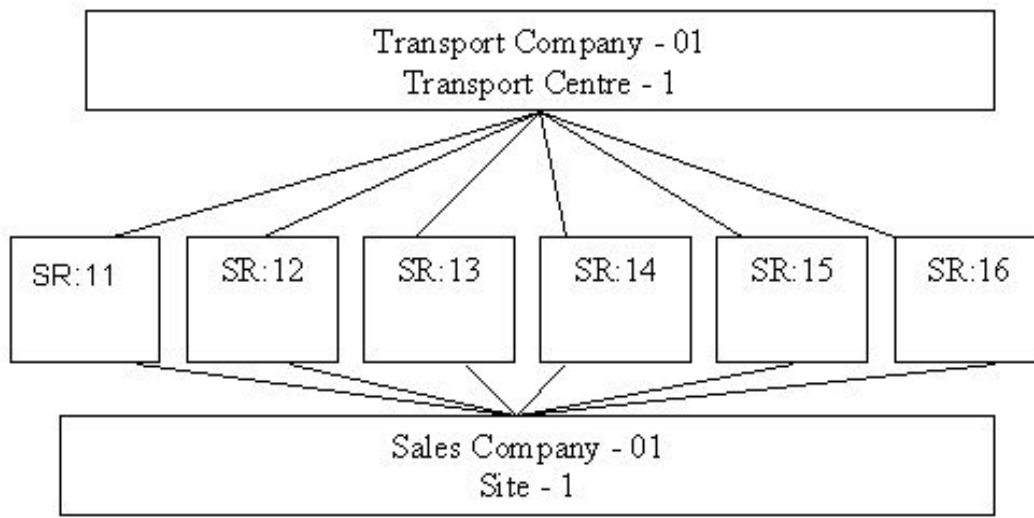
Note: *If you want to ensure that all goods sourced from a stockroom are transport planned, establish a default [delivery profile](#) for the stockroom. This default [delivery profile](#) will be used for all requirements placed against the stockroom for which a customer or distribution centre [delivery profile](#) cannot be found.*

Delivery Documentation

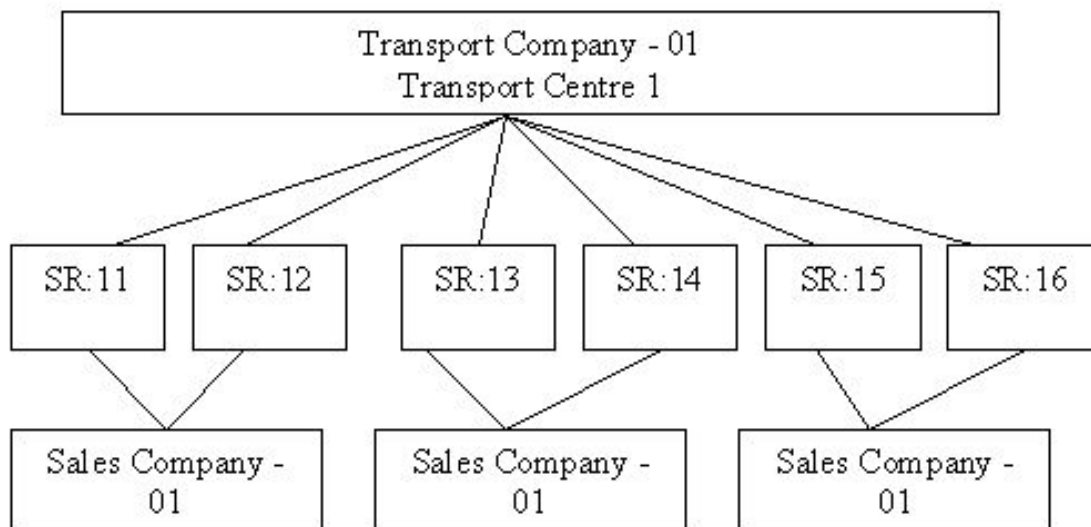
Transport Planning interfaces with the Document Processing application to produce despatch notes (consolidated and unconsolidated), or combined despatch notes and invoices, or both.

Note: *Delivery documentation can only be produced for despatched documents.*

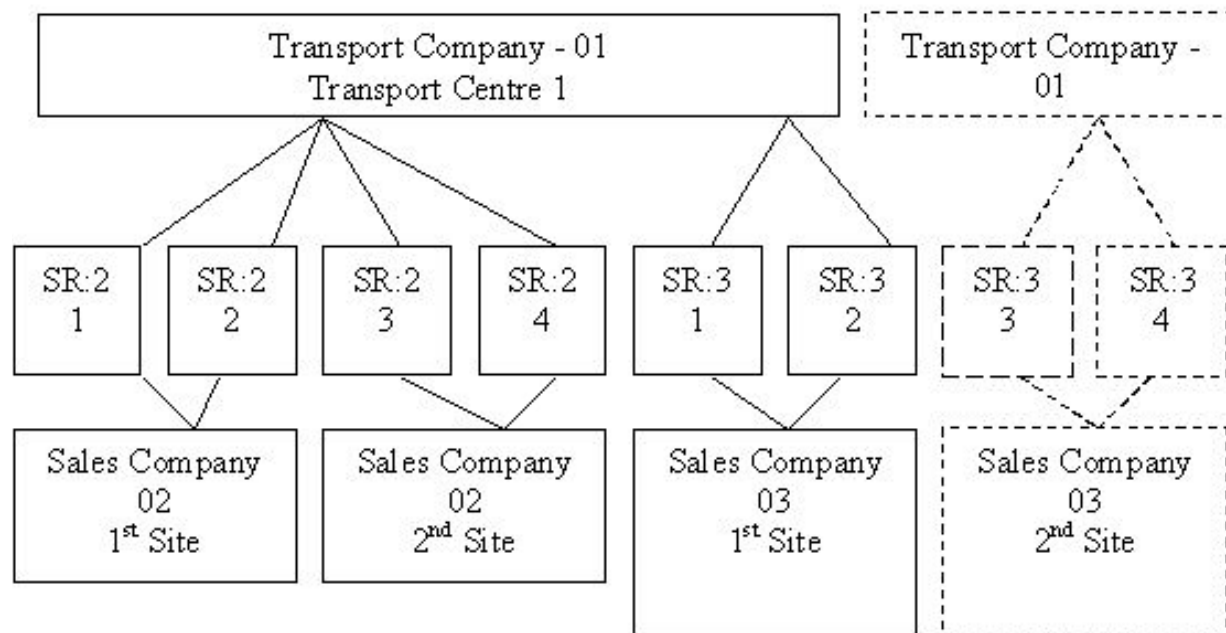
The interface allows for the various setup possibilities that exist for the configuration of [transport centres](#) and stockroom sites as shown below:



TC linked to single site



TC linked to multiple sites in the same sales company



TC linked to multiple sites in different sales companies

In addition to the selection criteria available within Document Processing, Transport Planning permits document selection by:

- Transport [carrier](#)
- [Route](#)
- [Load](#)

The user must be signed in to a [transport centre](#) before requesting the printing of delivery documentation. The list of stockrooms attached to the [transport centre](#) constrains the stockroom sites for which documentation is printed. For example, in Figure 3 above, a request to print delivery documentation by a user signed in to [Transport Centre 1](#) will ignore any despatches made from stockrooms 33 & 34, as these stockrooms are attached to a different [transport centre](#).

A [transport centre](#) has a list of stockrooms attached to it.

The list of stockrooms attached to a [transport centre](#) may contain stockrooms from more than one stockroom site, and these stockroom sites can be in different sales companies.

Upon initiation of the delivery documentation tasks, a list of those stockroom sites that pertain to the current [transport centre](#) is ascertained, by nature of their association with the stockrooms attached to the [transport centre](#).

If only a single stockroom site is found, that is, all stockrooms attached to the selected [transport centre](#) are attached to the same stockroom site in a single sales company, delivery documentation is produced for that single stockroom site only.

If multiple stockroom sites are found attached to a [transport centre](#), and these all reside in the same sales company, by default delivery documentation is produced for all stockroom sites attached to the current [transport centre](#) in that sales company.

If multiple stockroom sites are found attached to a [transport centre](#) and these reside in the multiple sales companies, by default delivery documentation is produced for all the stockroom sites attached to the current [transport centre](#) in all sales companies.

Note: Use of the delivery documentation tasks from the Transport Planning Processing menu does not preclude the use of the corresponding tasks on the Document Processing menus.

Note: However, the corresponding Document Processing tasks do not exclude documents that are planned onto transport [loads](#) and do not support the ability to control the printing of delivery documents by [route](#), [load](#) or transport [carrier](#).

Chapter 2 Maintenance

Introduction to Transport Planning

Relationship to Other Modules

To use Transport Planning you must have:

- Inventory Management
- Sales [Order](#) Processing

You can use Transport Planning with:

- Advanced [Order](#) Entry
- Distribution Requirements Planning (DRP) - You use the DRP interface to plan transport for depot replenishment as well as for retail deliveries.
- EDI Application Interface - You use the EDI interface to electronically receive sales [orders](#) and make them available for Transport Planning.
- Telesales
- Warehouse Management - You can produce a consolidated pick per [load](#), [route](#) or [carrier](#).
- Customer Returns – You use the Customer Returns interface to plan transport for the pick-up of returned goods.
- Accounts Payable - Once authorised, you can automatically transfer [carrier](#) invoices to the accounts payable invoice log.
- Advanced Financial Integrator (AFI) - Advanced Financial Integrator can post [carrier](#) charges and [payment](#) variances into the General Ledger, based on user defined rules.

Application Configuration

You can operate Transport Planning for a number of companies.

Within each transport company, you set up transport requirements for each defined stockroom. You can then manage transport on behalf of a number of physical depots.

The transport [planner](#) has a view of the transport requirements for each defined stockroom, and can build [loads](#) on behalf of each or amalgamate them onto combined [loads](#).

You can associate the [transport centre](#) with multiple sales companies, so the [planner](#) can manage transport across commercial companies or divisions within an organisation.

The AFI interface can post the calculated [carrier](#) freight charges and actual [payment](#) variances to multiple General Ledger companies.

Application Set-up Data

You need to plan and set up the following data before you can use Transport Planning:

- [Transport centres](#)
- Transport [planners](#)
- [Vehicle types](#)
- [Routes](#) and [nodes](#)
- [Carriers](#)
- [Carrier rates](#)
- [Areas](#)
- Item transport details
- [Delivery profiles](#)

When you have set up the data, Transport Planning is ready to use. You start by creating [loads](#), so you can build them with sales [orders](#) that are ready for delivery and request pick-up of returned goods en-[route](#).

Transport Centre [1/TPM]

A [transport centre](#) is a delivery depot, where you plan, pick and despatch transport [loads](#). You can maintain a number of control flags per [transport centre](#). These flags condition the processing of transport requirements and [loads](#).

Within the Transport Planning Build [Loads](#) process, the [container](#) summary for each transport requirement and a specified [load](#) number can be based upon [container](#) type.

The [Container](#) Summary Presentation Details define the presentation requirements for the [container](#) summary within a specific [transport centre](#).

The headings to appear for each column within the Build [Loads](#) task can also be defined.

Use this task to set up new [transport centres](#) and maintain existing centres.

Maintain Transport Centre Selection Window

To display this window, select the [Transport Centre](#) task.

Use this window to select the [transport centre](#) you want to maintain.#

Fields

Transport Centre

Enter a four-character code to add a new [transport centre](#).

Enter an existing code to maintain an existing [transport centre](#).

Alternatively, use the prompt facility to select from the Select [Transport Centre](#) pop-up.

[Planners](#) normally operate within a default [transport centre](#), but they can change to any authorised centre.

Press Enter to display the Maintain [Transport Centre](#) Detail window.

Maintain Transport Centre Detail Window

To display this window, enter or select a code and then press Enter on the Maintain [Transport Centre](#) Selection window.

Use this window to enter the basic details for the [transport centre](#).

Fields

Centre Name

Enter a [transport centre](#) name.

Load Number Prefix

Enter a character to be the [load](#) number prefix. The [load](#) reference prefix precedes all automatically-generated [load](#) references.

Load Number Range

Enter the range of numbers to use when automatically generating [load](#) numbers. The [load](#) numbers increment by 1, starting at the lower limit, up to and including the upper limit. If you reach the upper limit, Transport Planning re-assigns transport [load](#) references from the lower limit.

Manual Order Prefix

Enter a character to be the prefix for all manual [orders](#). This precedes all automatically-generated [order](#) numbers. You add manual [orders](#) using [Manual Requirement](#) Creation.

Manual Order Range

Enter the number range used to generate manual [order](#) numbers.

Default Freight Payment Method

Enter the freight [payment method](#) to use as a default for the [transport centre](#).

Alternatively, use the prompt facility to select from the TPPM Freight [Payment Method](#) pop-up.

The [payment methods](#) print on the bill of lading.

Bill Print Conversion Factor

Enter the [conversion factor](#) for the weight capacities. Before printing the [gross weight](#) of the [load](#) on the bill of lading, Transport Planning divides it by this factor.

Default Rating Conversion Factor

Enter the [conversion factor](#) for the [rating](#) of [loads](#). Transport Planning divides the [load](#) weight, [volume](#) or number of [containers](#) by this factor before accessing a [rate](#) for a given quantity.

Default Capacity on Screens

Enter one of the following to specify how you define the [capacity](#) for [orders](#), [drops](#) and [loads](#):

- 1 - Weight
- 2 - [Volume](#)
- 3 - [Containers](#)

Alternatively, use the prompt facility to select from the TPDC [Capacity](#) pop-up.

Add Order/Returns Immediately to Load

Select one of the following:

No (0) - To make Transport Planning suggest a suitable [load](#) number, but not automatically add the [order](#) to the [load](#)

Ords (1) - To add an [order](#) to a [load](#) with sufficient [capacity](#), matching [route](#), [ship date](#), [carrier](#) and [vehicle type](#)

If Transport Planning cannot find a [load](#) with the right [carrier](#), it adds the [order](#) to a [load](#) with a different [carrier](#). Returns have to be manually added with this setting.

Ords&Rts (2) - To add [orders](#) and returns to a [load](#) with sufficient [capacity](#) ([orders](#) only), and a matching [route](#), [ship date](#), [carrier](#) and [vehicle type](#)

If Transport Planning cannot find a [load](#) with the right [carrier](#), it adds the [order](#) or return to a [load](#) with a different [carrier](#).

Note: If Transport Planning does not find a suitable [load](#), you must create a suitable [load](#) and add the [order](#) or return to this [load](#), using the Build [Loads](#) task.

Allow Load to be Released before Goods Ready for Loading

Use this checkbox as follows:

Unchecked - If early release is not allowed

Checked - To allow you to release a [load](#) before confirming all of the despatch notes

Print BoL/Loadsheets Immediately after Load Released

Use this checkbox as follows:

Unchecked - To print the documentation in batch via the print [loads](#) task

Checked - To print [load sheets](#) and bill of lading documentation when you release [loads](#)

Bypass Confirm Load Despatch

Use this checkbox as follows:

Unchecked - You have to confirm each [load](#) as despatched

Checked - To be able to bypass confirm [load](#) despatch and automatically flag [loads](#) as waiting to be [dropped](#) to history, when you print or after you post transport charge [payments](#) or after you confirm the collection of any returns planned for the [load](#)

The Confirm Despatch of [Load](#) task date and time stamps the [load](#) so that you can check whether the [load](#) has left the premises.

Functions

Stockroom (F13)

Use this to allocate and de-allocate stockrooms to the [transport centre](#).

Press Enter to display the Maintain [Transport Centre](#) Temperature window.

Alternatively, if you are maintaining a [transport centre](#), you can select to save your changes and return to the Maintain [Transport Centre](#) Selection window. **Update (F8)**

Maintain Transport Centre Stockrooms Window

To display this window, select **Stockroom (F13)** on the Maintain [Transport Centre](#) Detail window.

[Transport centres](#) can plan the transport on behalf of multiple sales companies, multiple stockrooms, or both. Use this window to allocate and de-allocate stockrooms to the [transport centre](#) and to assign a default [delivery profile](#) to a stockroom.

Note: *You can only use a specific sales company and stockroom combination for one [transport centre](#). This relationship determines where to add the requirements.*

Fields

Select (Sel)

Select one of the following:

[Delivery Profile](#) (2) - To display the [Transport Centre](#) Stockroom [Delivery Profile](#) window, within which a default [delivery profile](#) may be maintained for the sales company and stockroom combination

Note: *An * is shown against an existing sales company and stockroom combination for which a default [delivery profile](#) has already been defined.*

Delete (4) - To delete the sales company and stockroom combination

Note: *Deletion of a sales company and stockroom combination from a [transport centre](#) also removes the default [delivery profile](#) for that sales company and stockroom combination.*

Functions

Add (F9)

Use this to add a sales company and stockroom combination.

All Stockrooms (F15)

Use this to assign all Inventory stockrooms within all sales companies to this [transport centre](#).

Select **Previous (F12)** to return to the Maintain [Transport Centre](#) Detail window.

Transport Centre Stockroom Addition Pop-up

To display this pop-up, select **Add (F9)** on the Maintain [Transport Centre](#) Stockrooms window.

Use this pop-up to allocate a stockroom to a [transport centre](#).

Fields**Sales Company**

Enter the sales company code.

Stockroom

Enter the sales company stockroom to add to the [transport centre](#).

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

Add Delivery Profile

A default [delivery profile](#) can be maintained for the stockroom.

Use this checkbox as follows:

Unchecked - If no default [delivery profile](#) is to be maintained

Checked - If a default [delivery profile](#) is to be maintained

Select **Update (F8)** to confirm your addition and display the [Transport Centre](#) Stockroom [Delivery Profile](#) window, if a [delivery profile](#) is to be added.

Alternatively, select **Previous (F12)** to return to the Maintain [Transport Centre](#) Detail window.

Transport Centre Stockroom Delivery Profile Window

To display this window, select [Delivery Profile](#) against a sales company and stockroom combination on the [Transport Centre](#) Stockrooms window or check the Add [Delivery Profile](#) field and then select **Update (F8)** on the [Transport Centre](#) Stockroom Addition pop-up.

Use this window to enter details of the [delivery profile](#) for the selected sales company and stockroom combination.

A stockroom [delivery profile](#), if it exists, will be used by the transport planning processes to decide whether to create transport requirements for [orders](#) placed against the stockroom if no specific customer [delivery profile](#) exists.

Fields

Route

Enter a [route](#) for this [delivery profile](#). This will be the default [route](#) for [orders](#) placed against this stockroom but maybe overridden when [loads](#) are built.

You can use the prompt facility on this field to select from the Select [Route](#) pop-up.

Drop

Enter the number of the [drop](#). This is used to work out the [drop](#) sequence for a particular [route](#).

Carrier

Enter a [carrier](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Area

Enter the [area](#) code to be used when calculating [rating](#) information.

Alternatively, use the prompt facility to select from the Select [Area](#) pop-up.

Customer Exclusive Loads

Use this checkbox as follows:

Unchecked - If [loads](#) picked from this stockroom are not exclusive by customer but can be made up of [orders](#) for many customers

Checked - If [loads](#) picked from this stockroom must contain [orders](#) for one customer only

Note: If you check this field, when you build [loads](#) a flashing * indicates that the customer requires confirmation of delivery.

Collect Returns

Use this checkbox as follows:

Unchecked - To indicate that returns placed against this stockroom should not generate transport requirements

Checked - To indicate that returns placed against this stockroom should generate transport requirement enabling collection of goods to be planned

Note: This is field displayed if the Customer Returns application is installed and the Transport Planning Attached field in the Customer Returns company profile is checked.

Deliveries Allowed

Use the checkbox for each day of the week as follows:

Unchecked - If deliveries are not allowed from this stockroom on this day of the week

Checked - If deliveries are allowed from this stockroom on this day of the week

Note: The days are highlighted if delivery [time slots](#) have been set.

Functions

Delete (F11)

Use this to delete the [delivery profile](#) for the sales company and stockroom combination.

Note: You can only delete the profile if there are no outstanding [orders](#) or [load drops](#) recorded against it.

Select **Update (F8)** to save your changes and return to the [Transport Centre](#) Stockrooms window.

Maintain Transport Centre Temperature Window

To display this window, press Enter on the Maintain [Transport Centre](#) Detail window.

Use this window to enter more advanced [transport centre](#) details.

Fields

Default Commodity Code

Enter the [commodity code](#) to use as a default when creating [pending loads](#).

Alternatively, use the prompt facility to select from the TPCC [Commodity Code](#) pop-up.

This is printed on the bills of lading.

Default Tax Code

Enter the tax code

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

Note: If you have defined a General Ledger company to the transport company, you must define the tax codes to the General Ledger.

Temperatures

Enter the temperature range for the shipment of temperature dependent goods. This is the default for created [loads](#).

If you enter one temperature, the fixed temperature message is printed on the bill of lading documentation.

If you enter two temperatures, the temperature range message is printed on the bill of lading documentation.

Fixed Temperature Message

Enter the fixed temperature message. This is printed on the bill of lading documentation if you only enter one temperature against a [load](#) header.

Temperature Range Message

Enter the temperature range message. This is printed on the bill of lading documentation, along with both temperatures, if you enter two temperatures against a [load](#) header.

Detailed Container Summary

Use this checkbox as follows:

Unchecked - To calculate [container](#) values for each transport requirement for the [transport centre](#) based upon the [container](#) number, weight and [tare weight](#) specified for the shipped product on the Item Transport Details.

Note: *[Container](#) summary presentation details need only be established at [transport centre](#) level if the [container](#) summary for a specific [transport centre](#) is different from that defined at transport company level.*

Checked - To calculate [container](#) numbers and [volumes](#) for each requirement for the [transport centre](#) based upon the standard outer [container](#) specified for the shipped product on the Item Transport Details.

Note: *The [container](#) summary presentation details for a [transport centre](#) can only be overridden where a detailed [container](#) summary is requested at transport company level.*

Select **Update (F8)** to save the information and to return to the Maintain [Transport Centre](#) Selection window.

Container Summary Presentation Details Pop-up

To display this pop-up, **check** the Detailed [Container](#) Summary field on the Maintain [Transport Centre](#) Temperature window

A list of [container](#) types (as defined in the Inventory Descriptions file under major type CTP) is displayed.

For each [container](#) type, you identify the column into which the number of [containers](#) of that type required for shipment is accumulated when constructing the detailed [container](#) summary information during the Build [Loads](#) process.

Fields

Column

Enter any numeric value in the range 1 to 7.

Functions

Column Heading (F14)

Use this to define the appropriate headings to appear in the Build [Loads](#) task for each column of the [container](#) summary. The [Container](#) Summary Column Headings pop-up is displayed.

Select **Update (F8)** to save the information and to return to the Maintain [Transport Centre](#) Temperature window.

Container Summary Column Headings Pop-Up

To display this pop-up, select **Column Heading (F14)** on the [Container](#) Summary Presentation Details pop-up.

Use this pop-up to define the column headings to appear within the Build [Loads](#) task for the extended [container](#) summary.

Enter an appropriate description and heading for each of the seven available columns in the [container](#) summary.

Fields

Description

Enter a description, using up to thirty characters, for each column.

Heading

Enter a heading, using up to five characters, for each column.

Select **Update (F8)** to accept the entered values and return to the [Container](#) Summary Presentation Details pop-up.

Transport Node [2/TPM]

A [node](#) is a geographical location where one or more [routes](#) start or end. This is typically a company distribution centre (DC), but can be a location used by the [carrier](#) as a depot, or a location to break down bulk [loads](#).

Use this task to define [nodes](#) for the [transport centre](#) currently in use.

Maintain Transport Nodes Selection Window

To display this window, select the Transport [Node](#) task.

Use this window to select the transport [node](#) you want to maintain, or enter the code for a new transport [node](#).

Fields

Transport Node

Enter a new or existing transport [node](#) or geographical location.

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Press Enter to display the Maintain Transport [Nodes](#) Detail window.

Maintain Transport Nodes Detail Window

To display this window, enter or select a transport [node](#) and then press Enter on the Transport [Nodes](#) Selection window.

Use this window to enter the details for the transport [node](#).

Fields

Name

Enter the name of the transport [node](#).

County

Enter the county or state for the transport [node](#).

Alternatively, use the prompt facility to select from the TPCY County pop-up.

Select **Update (F8)** to add or change the transport [node](#) and to return to the previous window.

Vehicle Type [3/TPM]

Use this task to define [vehicle types](#) and their associated capacities ([gross weight](#) and [volume](#)).

When you assign a [vehicle type](#) to a [load](#), Transport Planning keeps a check on its current [load](#) size and makes sure that it does not exceed the maximum values assigned here.

Note: If you do not set up a [vehicle type](#), Transport Planning cannot check the [capacity](#) when assigning [loads](#) automatically.

Maintain Vehicle Types Selection Window

To display this window, select the [Vehicle Type](#) task.

Use this window to enter the code of the [vehicle type](#) that you wish to maintain or create.

Fields

Vehicle Type

Enter a code for a new or existing type of [vehicle](#).

Alternatively, use the prompt facility to select from the Select [Vehicle Type](#) pop-up.

Press Enter to display the [Vehicle Type](#) Detail window.

Maintain Vehicle Types Detail Window

To display this window, enter or select a code and then press Enter on the Maintain [Vehicle Type](#) Selection window.

Use this window to enter or amend the details for the selected [vehicle type](#).

Fields

Description

Enter a description for the [vehicle type](#).

Weight Capacity

Enter the maximum [gross weight capacity](#) for the [vehicle type](#).

Volume Capacity

Enter the maximum [volume capacity](#) for the [vehicle type](#).

Note: Transport Planning uses the capacities when you build a [load](#). If you exceed the capacities you receive a warning message, which can be overridden.

Functions

Delete (F11)

Use this to delete the [vehicle type](#). You must select **Delete (F11)** again to confirm deletion.

Select **Update (F8)** to save the information and to return to the Maintain [Vehicle Types](#) Selection window.

Carrier Rate [4/TPM]

Use this task to maintain the tables used to [rate loads](#) automatically and calculate [carrier](#) freight charges.

You should set up a [rate code](#) and expiry date for each set of charges applied to a group of [carriers](#), an individual [carrier](#), or an individual [route](#) covered by the [carrier](#). You assign the [rates](#) to the [carrier](#) using the [Carrier](#) maintenance task. The [rate code](#) and description should clearly describe when to apply these charges.

There are four [rating methods](#) you can use. They are:

- A table of charges based on the [loads](#) gross [capacity](#), with a fixed [rate](#) per [drop](#) and a maximum and/or minimum [drop charge](#)

You can enter a [surcharge](#) value or percentage to accommodate the unforeseen.

- A table of charges based on the gross [capacity](#) per [load drop](#)

You can enter a [surcharge](#) value or percentage to accommodate the unforeseen.

- A charge based on the gross [capacity dropped](#) into each [area](#)

For each [area](#) you enter the fixed charge per unit of [capacity](#), the [surcharge](#) value or percentage, the [drop](#) minimum and maximum charge and the [area minimum](#) charge.

- A table of charges based on the gross [capacity dropped](#) into each [area](#)

The [capacity](#) you use can be [gross weight](#), [load volume](#) or number of [containers](#).

Once you have [rated](#) a [load](#), you can transfer the charge to the General Ledger (via AFI) as an accrued cost (for more information, see the Advanced Financial Integrator product guide). Also, you use the calculated [load](#) charge as the basis when you match the [carrier's](#) invoice. (See the [Authorise Payments](#) section in the Processing chapter of this product guide for details on authorising [carrier payments](#).)

Maintain Carrier Rate Selection Window

To display this window, select the [Carrier Rate](#) task.

Use this window to select the [carrier rate](#).

Fields

Rate Method

Enter one of the following:

01 - To calculate charges based on the [load's gross weight](#), [volume](#) or number of [containers](#), using a [rating](#) table

02 - To calculate charges for each [drop](#), based on the [gross weight](#), [volume](#) or number of [containers](#), using a [rating](#) table

03 - To calculate charges using a fixed [rate](#), based on the [gross weight](#), [volume](#) or number of [containers dropped](#) into each [area](#)

04 - To calculate charges based on the [gross weight](#), [volume](#) or number of [containers](#) for each [area](#), using a [rating](#) table

Alternatively, use the prompt facility to select from the TPRM [Rating Method](#) pop-up.

Rate Code

Enter a code to identify this [rate](#). This can be an existing or a new [rate code](#).

Alternatively, use the prompt facility to select from the Select [Rate Code](#) pop-up.

Note: You must enter a [rate](#) method before using the prompt facility on this field.

Effective Date

Enter or select the date from which the [rating](#) information is effective. You can set up multiple dates, so you can add new [rates](#) before they come into effect.

Press Enter to display the Maintain [Carrier Rates](#) Detail window, if [Rate](#) Method is 01 or 02.

Maintain Carrier Rates Detail Window

To display this window, enter a [Rate](#) Method of 01 or 02 and then press Enter on the Maintain [Carrier Rate](#) Selection window.

Use this window to enter the information required to [rate loads](#) by:

- Total gross [capacity](#) - if [rate](#) method is 01
- [Drop capacity](#) - if [rate](#) method is 02

Fields

Description

Enter the description for the [rating](#) information. For example, you could enter the [carrier](#) and [route](#) to which this applies.

Capacity Type

If you are defining a new [rate](#) table, enter the default [capacity](#). To set it to [volume](#), select **Volume (F14)**, to set it to [containers](#), select **Containers (F15)**, or to set it to weight, select **Weight (F16)**.

If you are maintaining a [rate](#) table, this field is for information only.

Tax Code

Enter the tax code to use to calculate the tax on [load](#) charges. The software applies the tax when you transfer the invoice to Accounts Payable.

You can use the prompt facility to select from the Tax Code Selection pop-up.

Drop Charge Rate

Enter the fixed charge for each [drop](#) on a [load](#).

Minimum Drop Charge

Enter the minimum charge for each [drop](#) on a [load](#). You do not need this for [Rate](#) Method 01.

Maximum Drop Charge

Enter the maximum charge for each [drop](#) on a [load](#). You do not need this for [Rate](#) Method 01.

Surcharge %

Enter a percentage to apply to [load](#) or [area](#) charges to accommodate unforeseen extras, for example government fuel tax charges.

Surcharge Value

Enter a value to apply to [load](#) or [area](#) charges to accommodate unforeseen extras, for example government fuel tax charges.

Note: You can enter either a [surcharge](#) percentage or value, but not both.

Minimum Load Charge

Enter the minimum charge for a [load](#).

Number of Free Drops

Enter the number of [free drops](#) when calculating [load](#) charges.

Functions**Charge Structure (F13)**

Use this to set up the [charge structure](#).

Volume (F14)

Use this to set the [capacity type](#) to [volume](#).

Containers (F15)

Use this to set the [capacity type](#) to number of [containers](#).

Weight (F16)

Use this to set the [capacity type](#) to weight.

Note: You can only set the [capacity type](#) when you are defining a new [rate](#) method, code and effectivity date combination.

Select **Update (F8)** to save the information and to return to the Maintain [Carrier Rate](#) Selection window.

Maintain Carrier Rates Charge Structures Pop-up

To display this pop-up, select [Charge Structure \(F13\)](#) on the Maintain [Carrier Rates](#) Detail window.

Alternatively, select Charges against an [area](#) on the Maintain [Carrier Rates Area](#) Detail window.

Use this pop-up to set up and amend [charge structures](#) for the [rate code](#).

Fields**Conversion Factor**

Enter the [conversion factor](#) to use when [rating loads](#). Transport Planning divides the [capacity](#) of a [load](#) by this [conversion factor](#) before accessing a [rate](#) for a given quantity.

Options**Select**

Use this to select the break for amendment.

Delete

Use this to delete the break details.

Functions**Add (F9)**

Use this to add new [charge structure](#) details.

Select **Update (F8)** to return to the Maintain [Carrier Rates](#) Detail window.

Maintain Carrier Rates Level Break Details Pop-up

To display this pop-up, select **Add (F9)** on the [Carrier Rate Charge Structures](#) pop-up.

Use this pop-up to add a level break to the [charge structure](#).

Fields

Gross Capacity

Enter the gross [capacity](#) (in weight, [volume](#) or number of [containers](#)).

Rate

Enter the charge [rate](#) for the [capacity](#).

Flat Rate

Use this checkbox as follows:

Unchecked - If the [rate](#) is per unit of weight, [volume](#) or number of [containers](#)

Checked - If the [rate](#) is an absolute value for this range

Note: If you define a flat [rate](#), it must be between the minimum and maximum [drop charges](#).

Press Enter to save the details and to return to the Maintain [Carrier Rates Charge Structures](#) pop-up.

Maintain Carrier Rates Area Details Window

To display this window, enter a [Rate](#) Method of 03 or 04 and press Enter on the Maintain [Carrier Rates](#) Selection window.

Use this window to maintain [area rating](#) details for a [carrier](#). Transport Planning calculates charges based on the [gross weight](#), [volume](#) or number of [containers dropped](#) into each [area](#) using a fixed [rate](#) (03) or a [capacity](#) table (04).

Fields

Tax Code

Enter the tax code to use to calculate tax on [load](#) charges. Transport Planning applies this when you transfer the invoice to Accounts Payable.

You can use the prompt facility to select from the Tax Code Selection pop-up.

Conversion Factor

Enter the [conversion factor](#). Transport Planning divides the [capacity](#) by this factor before accessing a [rate](#) for a given quantity.

Description

Enter a description for the [rating](#) information. For example, you could enter the [carrier](#) and [route](#) to which this applies.

Options**Select**

Use this to select the [area](#) for amendment.

Delete

Use this to delete the [area](#) details.

Charges

Use this to enter [charge structures](#).

Note: *Charges is only available if the [rate](#) method is 04 ([Area](#) and [Rate](#) Table).*

Functions**Add (F9)**

Use this to add [area rate](#) details.

Volumes (F14)

Use this to set the [capacity type](#) to [volume](#).

Containers (F15)

Use this to set the [capacity type](#) to number of [containers](#).

Weights (F16)

Use this to set the [capacity type](#) to weight.

Note: *You can only set the [capacity type](#) when you are defining a new [rate](#) method, code and effectivity date combination.*

Select **Update (F8)** to save the information and to return to the Maintain [Carrier Rates](#) Selection window.

Maintain Area Rate Pop-up

To display this pop-up, select **Add (F9)** on the Maintain [Carrier Rate Area](#) Details window.

Use this pop-up to maintain [area rate](#) details.

Fields**Area**

Enter an [area](#).

Alternatively, use the prompt facility to select from the Select [Area](#) pop-up.

Note: You cannot change the [Area](#) field once the details have been set up.

Weight/Volume/Container Rate

This is only displayed if you are maintaining [rating method](#) 03.

Enter the [rate](#) for the given [capacity](#) unit, for example weight, [volume](#) or number of [containers](#).

Area Minimum

Enter the minimum charge for the [area](#).

Drop Minimum

Enter the minimum charge for each [drop](#) on a [load](#).

Drop Maximum

Enter the maximum charge for each [drop](#) on a [load](#).

Surcharge Value

Enter a value to apply to [load](#) or [area](#) charges, to accommodate unforeseen extras, for example government fuel tax charges.

Surcharge Percentage

Enter a percentage to apply to [load](#) or [area](#) charges, to accommodate unforeseen extras, for example government fuel tax charges.

Note: You can enter either a [surcharge](#) percentage or value, but not both.

Select **Update (F8)** to add the details and to return to the Maintain [Carrier Rates Area](#) Details window.

Carrier [5/TPM]

Use this task to enter details for all the [carriers](#) used to transport the goods.

You must define all [carriers](#), whether they are internal or external.

Maintain Carriers Selection Window

To display this window, select the [Carrier](#) task.

Use this window to enter the code for the [carrier](#) you want to maintain or create.

Fields

Carrier

Enter a reference code for the [carrier](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Note: You must define the [carrier](#) to each [transport centre](#) it uses.

Press Enter to display the Maintain [Carriers](#) Detail window.

Maintain Carriers Detail Window

To display this window, enter or select a [carrier](#) and then press Enter on the Maintain [Carriers](#) Selection window.

Use this window to add or maintain the [carrier](#) details including contact information.

Fields

Name

Enter the name of the [carrier](#). This is printed on the bill of lading.

Address

Enter the [carrier](#) address. This is printed on the bill of lading.

Carrier Type

Enter a [carrier type](#)

Alternatively, use the prompt facility to select from the TPCT [Carrier Type](#) pop-up.

If the [carrier type](#) has a Parameter Limit of 1, this determines that the [carrier](#) is an Own [carrier](#), i.e. a [carrier](#) belonging to the company that is selling and despatching the goods. (This is in contrast with a Third Party [carrier](#), i.e. an external one hired to deliver the goods.)

Contact Name

Enter the name of the contact for the [carrier](#).

Phone Number

Enter the telephone number for the contact.

Fax Number

Enter the fax number for the contact.

Rating Required

Use this checkbox as follows:

Unchecked - Not to calculate the transport charges

Checked - To calculate transport charges automatically for the [carrier](#)

Rate Method

Enter one of the following to indicate the method of [automatic rating](#) to use:

Enter one of the following:

01 - To calculate charges based on the [load's gross weight](#), [volume](#) or number of [containers](#), using a [rating](#) table

02 - To calculate charges for each [drop](#), based on the [gross weight](#), [volume](#) or number of [containers](#), using a [rating](#) table

03 - To calculate charges using a fixed [rate](#), based on the [gross weight](#), [volume](#) or number of [containers dropped](#) into each [area](#)

04 - To calculate charges based on the [gross weight](#), [volume](#) or number of [containers](#) for each [area](#), using a [rating](#) table

Alternatively, use the prompt facility to select from the TPRM [Rating Method](#) pop-up.

Rate Code

Enter the [rate code](#) for this [carrier](#).

Alternatively, use the prompt facility to select from the Select [Rate Code](#) pop-up.

This is the default, but you can override it at [carrier route](#) level.

Payables Account

This is used to define a supplier code, which must be a valid account number in Accounts Payable.

There is no 'sense check' on the [Carrier Type](#) and [Payables Account](#), although it would be unusual to have an own [carrier](#) and a [payables account](#).

You can use the prompt facility to select from the Supplier Codes pop-up.

Note: *You must have defined the supplier to Accounts Payable.*

Functions

Routes (F13)

Use this to define the [routes](#) for which you can use this [carrier](#).

Text (F21)

Use this to enter internal text for the [carriers](#).

Language Descriptions (F23)

Use this to enter and maintain the descriptions for different languages. The Multi-Lingual Descriptions Maintenance pop-up is displayed.

Select **Update (F8)** to save the details and to return to the Maintain [Carriers](#) Selection window.

Restrict Carriers to Routes Pop-up

To display this pop-up, select **Routes (F13)** on the Maintain [Carriers](#) Detail window.

Use this pop-up to restrict the [carrier](#) to certain [routes](#). If you do not select any [routes](#), you can use the [carrier](#) on any [route](#) that is defined to the [transport centre](#).

Options

Select

Use this to select the [route](#) for amendment.

Delete

Use this to delete the [carrier route](#) details.

Functions

Add (F9)

Use this to display the Restrict [Routes](#) Addition pop-up.

Select **Update (F8)** to save the information and to return to the Maintain [Carrier](#) Details window.

Restrict Routes Addition Pop-up

To display this pop-up, select **Add (F9)** on the Restrict [Carriers](#) to [Routes](#) pop-up.

Alternatively, select a [route](#) for amendment on the Restrict [Carriers](#) to [Routes](#) pop-up.

Use this pop-up to add and maintain [routes](#) for a [carrier](#).

Fields

Route

Enter the [route](#) the [carrier](#) can use.

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

If you are maintaining [routes](#), this field is for information only.

Rate Method

Enter one of the following:

01 - [Load](#) and [rate](#) table

02 - [Drop](#) and [rate](#) table

03 - Fixed [rate](#) per [area](#)

04 - [Area](#) and [rate](#) table

Alternatively, use the prompt facility to select from the TPRM [Rating Method](#) pop-up.

Rate Code

Enter the [rate code](#).

Alternatively, use the prompt facility to select from the Select [Rate Code](#) pop-up.

Select **Update (F8)** to save the details and to return to the Restrict [Carriers](#) to [Routes](#) pop-up.

Route [6/TPM]

Use this task to define the journeys undertaken by the internal and external [carriers](#) between two geographical locations. You define the [route](#) by a code and description, and you can assign an [origin](#) and [destination](#), which can be the same for circular [routes](#).

Before you define [routes](#), you must define the [nodes](#) representing the [origins](#) and [destinations](#). See the Transport [Node](#) section for further details.

Note: When you create a [load](#); the default settings are taken from the [route](#) entered, for example the [carrier](#), [vehicle type](#) and [ship time](#).

Maintain Routes Selection Window

To display this window, select the [Route](#) task.

Use this window to enter the [route](#) that you want to maintain or create.

Fields

Route

Enter the [route](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Note: For a [master load](#), define the [route](#) codes for the sub-[loads](#) to the [transport centre](#) where you ship the [master load](#).

Press Enter to display the Maintain [Route](#) Detail window.

Maintain Route Detail Window

To display this window, enter or select a [route](#) and then press Enter on the Maintain [Routes](#) Selection window.

Use this window to enter the details for the selected [route](#).

Fields

Description

Enter a description for the [route](#).

Default Carrier

Enter the [carrier](#) to use as the default for this [route](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Default Vehicle Type

Enter the default type of [vehicle](#) for this [route](#).

Alternatively, use the prompt facility to select from the Select [Vehicle Type](#) pop-up.

Transport Planning uses [vehicle types](#) to check that you do not exceed the defined [gross weight](#) and [volume](#) when building [loads](#).

Origin

Enter the [origin](#) or start point for the [route](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

You must define the [origins](#) as transport [nodes](#). The [origins](#) are printed on the bill of lading.

Destination

Enter the [destination](#) or end point for the [route](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

You must define the [destinations](#) as transport [nodes](#). The [destinations](#) are printed on the bill of lading.

Bill of Lading Required

Use this checkbox as follows:

Unchecked - If you do not require a bill of lading, just a [load sheet](#)

Checked - If you require a bill of lading and a [load sheet](#)

Bill of Lading Format

Enter one of the following:

01 - One document per [load](#)

The [capacity](#) totals are from the [load](#) header and the despatch notes are associated with each the [load](#).

02 - One document per [drop](#)/delivery point on [route](#)

The [capacity](#) totals are per [drop](#)/delivery point and the despatch notes are associated with [drop](#)/delivery point.

03 - One document per [load](#)

The [capacity](#) totals are from the [load](#) header with one line total per [drop](#). The despatch notes are for each [drop](#)/delivery point.

04 - One document per [load](#)

The [capacity](#) totals are per [area](#) and for the [load](#). The despatch notes are associated with the [load](#).

Alternatively, use the prompt facility to select from the TPBL Bill of Lading Format pop-up.

You use the Inventory Descriptions file, major type TPBL, to support and maintain these formats.

Number of Copies

Enter the number of copies of the bill of lading documentation you require.

Note: You set up the defaults for the bill of lading formats here, but you can change them at [load level](#).

Default Ship Time

Enter the default [ship time](#) assigned to the [route](#). This field is for information only.

Functions**Language Descriptions (F23)**

Use this to enter and maintain the descriptions for different languages. The Multi-Lingual Descriptions Maintenance pop-up is displayed.

Select **Update (F8)** to save the details and return to the Maintain [Routes](#) Selection window.

Area [7/TPM]

Use this task to define the [areas](#) or zones which are used to group [load drops](#). You can then [rate loads](#) and split [load](#) documentation by [area](#) ([Rating Methods](#) 03 and 04). You can assign a [rating area](#) to a customer on the customer [delivery profile](#).

Maintain Areas Selection Window

To display this window, select the [Area](#) task.

Use this window to define an [area](#).

Fields**Area**

Enter an [area](#).

Alternatively, use the prompt facility to select from the Select [Area](#) pop-up.

Press Enter to display the Maintain [Areas](#) Detail window.

Maintain Areas Detail Window

To display this window, enter or select an [area](#) code and then press Enter on the Maintain [Areas](#) Selection window.

Use this window to define an [area](#).

Fields**Name**

Enter a description for the [area](#).

Functions**Delete (F11)**

Use this to delete the [area](#).

Note: You cannot delete the [area](#) if it is defined to a [delivery profile](#).

Language Descriptions (F23)

Use this to enter and maintain the descriptions for different languages. The Multi-Lingual Descriptions Maintenance pop-up is displayed.

Select **Update (F8)** to complete the routine.

Delivery Profile [8/TPM]

Use this task to define profile details for each delivery point and to define a default [delivery profile](#) for a stockroom.

You set up a [delivery profile](#) for each customer delivery point or distribution centre that you want to consider whilst planning transport from this [transport centre](#).

You set up a [delivery profile](#) for a stockroom if you want to consider shipments to/from that stockroom whilst planning transport for this [transport centre](#) to customer delivery points and distribution centres that do not have their own [delivery profile](#) established.

Maintain Delivery Profiles Selection Window

To display this window, select the [Delivery Profile](#) task.

Use this window to select the sales company and customer or stockroom combination for the [delivery profile](#).

Fields**Sales Company**

Enter a company.

Alternatively, use the prompt facility to select from the Select Sales Company pop-up.

Customer

Enter a customer and delivery sequence.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Note: If you want to use the prompt facility on the Customer field you must have entered a sales company.

Stockroom

Enter a stockroom

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

Enter or select a sales company, customer and delivery sequence and then press Enter to display the Maintain Customer [Delivery Profile](#) Detail window.

Alternatively, enter or select a sales company and stockroom and then press Enter to display the Maintain Stockroom [Delivery Profile](#) Detail window.

Maintain Customer Delivery Profile Details Window

To display this window, enter or select a sales company, customer and delivery sequence and then press Enter on the Maintain [Delivery Profiles](#) Selection window.

Use this window to enter the details of the [delivery profile](#) for the selected sales company and customer combination.

Fields

Route

Enter a [route](#) for this [delivery profile](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

This is the default, but you can override it when you build [loads](#).

Drop

Enter the number of the [drop](#). This is used to work out the [drop](#) sequence for a particular [route](#).

Note: If you define [drops](#) with gaps in the sequence numbers, you can easily insert new [drops](#) later.

Carrier

Enter a [carrier](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Area

Enter the [area](#) code to use when calculating [rating](#) information.

Alternatively, use the prompt facility to select from the Select [Area](#) pop-up.

Customer Exclusive Loads

Use this checkbox as follows:

Unchecked - If [loads](#) are not exclusive to this customer and can be made up of mixed customer [orders](#)

Checked - If [loads](#) must only contain [orders](#) for this customer

Confirm Delivery Time Slot

Use this checkbox as follows:

Unchecked - If you do not need to confirm a delivery time with the customer

Checked - If you need to confirm a delivery time with the customer

Note: If you check this field, when you build [loads](#), a flashing asterisk indicates that the customer requires confirmation of delivery.

Collect Returns

This is displayed if Customer Returns is installed and the Transport Planning Attached field in the Customer Returns company profile is **checked**.

Note: This field is not displayed if Customer Returns is not installed or if the Transport Planning Attached field is left unchecked.

Use this checkbox as follows:

Unchecked - To indicate that returns recorded for this customer should not be passed to Transport Planning for collection

Checked - To indicate that returns recorded for this customer should be passed to Transport Planning for collection

Deliveries Allowed

Use this checkbox as follows for each day of the week:

Unchecked - If deliveries are not allowed

Checked - If deliveries are allowed

Note: The days are highlighted if delivery [time slots](#) are set up.

Functions

Delete (F11)

Use this to delete the [delivery profile](#). You can only delete the profile if there are no outstanding [orders](#) or [load drops](#) for it.

Delivery Time Slots (F13)

Use this to display the Delivery [Time Slots](#) pop-up.

Text (F21)

Use this to attach text to the [delivery profile](#).

Select **Update (F8)** to save the information and to return to the Maintain [Delivery Profiles](#) Selection window

Maintain Stockroom Delivery Profile Details Window

To display this window, enter or select a sales company and stockroom and then press Enter on the Maintain [Delivery Profiles](#) Selection window.

Use this window to enter the details of the [delivery profile](#) for the selected sales company and stockroom combination.

Fields

Route

Enter a [route](#) for this [delivery profile](#). This will be the default [route](#) for [orders](#) placed against this stockroom but maybe overridden when [loads](#) are built.

You can use the prompt facility on this field to select from the Select [Route](#) pop-up.

Drop

Enter the number of the [drop](#). This is used to work out the [drop](#) sequence for a particular [route](#).

Carrier

Enter a [carrier](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Area

Enter the [area](#) code to be used when calculating [rating](#) information.

Alternatively, use the prompt facility to select from the Select [Area](#) pop-up.

Customer Exclusive Loads

Use this checkbox as follows:

Unchecked - If [loads](#) picked from this stockroom are not exclusive by customer but can be made up of [orders](#) for many customers

Checked - If [loads](#) picked from this stockroom must contain [orders](#) for one customer only

Note: If you check this field, when you build [loads](#), a flashing * indicates that the customer requires confirmation of delivery.

Collect Returns

Use this checkbox as follows:

Unchecked - To indicate that returns placed against this stockroom should not generate transport requirements

Checked - To indicate that returns placed against this stockroom should generate transport requirement enabling collection of goods to be planned

Note: This field is displayed if the Customer Returns application is installed and the Transport Planning Attached field in the Customer Returns company profile is checked.

Deliveries Allowed

Use the checkbox for each day of the week as follows:

Unchecked - If deliveries are not allowed from this stockroom on this day of the week

Checked - If deliveries are allowed from this stockroom on this day of the week

Note: The days are highlighted if delivery [time slots](#) have been set.

Functions

Delete (F11)

Use this to delete the [delivery profile](#) for the sales company and stockroom combination.

Note: You can only delete the profile if there are no outstanding [orders](#) or [load drops](#) recorded against it.

Select **Update (F8)** to save your changes and return to the Maintain [Delivery Profiles](#) Selection window.

Delivery Time Slots Pop-up

To display this pop-up, place the cursor over a day which allows deliveries, and select **Delivery Time Slots (F13)** on the Maintain [Delivery Profiles](#) Details window.

Use this pop-up to enter the delivery times allowed for the selected day.

Fields

Time Slot 1-4

Enter the [time slots](#) during which customers will accept deliveries.

Select **Update (F8)** to save the information and to return to the Maintain [Delivery Profiles](#) Details window.

Item Transport Detail [9/TPM]

Use this task to add item transport details to the Inventory item definition. These are used to calculate the [capacity](#) requirements. You must define all items to the application in [order](#) to assess the capacities. Otherwise the item is ignored when an [order](#) is passed into Transport Planning and is recorded on the Serious Error report.

If the Detailed [Container](#) Summary field is **checked** for a [transport centre](#), items with [container](#) profiles can have a default outer defined. This will be the [container](#) used in [volume](#) and number of [container](#) calculations for these items.

Maintain Item Transport Details Selection Window

To display this window, select the Item Transport Detail task.

Use this window to select the item.

Fields

Sales Company

Enter the Sales [Order](#) Processing/Inventory Management company associated with the processing of [orders](#) and stocking of the item.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Item Code

Enter an item.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Note: You must have defined the item to the selected Sales [Order](#) Processing and Inventory Management company.

Customer

You can optionally enter a customer code and delivery sequence for customers with non-standard [containers](#).

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If there is no customer-specific [container](#) profile for that item, an error message is displayed.

Functions

Customer Containers (F16)

Use this to display a list of customers for the entered item that have a non-standard [container](#) profile defined.

Press Enter to display the Maintain Item Transport Details window.

Select Customers with Non-standard Containers Pop-up

To display this pop-up, select **Customer [Containers](#) (F16)** on the Maintain Item Transport Details Selection pop-up.

Use this pop-up to select a customer with a non-standard [container](#).

Fields

Outer Defined

YES in this field indicates that a standard outer has already been defined for this customer and item.

NO is displayed in this field if the standard outer has yet to be defined for this customer and item.

Caution: If the standard outer for the customer has not been defined, the volume and container type will be calculated based on whatever is defined on the default transport item profile.

Options

Select

Use this to select a customer.

Press Enter to display the Maintain Item Transport Details window.

Maintain Item Transport Details Window

To display this window, press Enter on the Maintain Item Transport Details Selection window.

Use this window to enter the [capacity](#) details for the item.

Note: If an item has a customer-specific [container](#) profile, it should also have customer-specific item transport details for correct calculation of weights, [volumes](#) and [containers](#).

Note: Items with a [container](#) profile which is not customer-specific should have item transport details which are not customer-specific. In both these cases, a standard outer should be defined.

Note: If a customer-specific [container](#) profile is deleted, the customer-specific item transport details are also deleted.

Note: If, when a customer-specific transport profile is deleted, a [container](#) profile exists for the item only and an item-only item transport profile has not been set up, the item has no transport profile and so a warning message is issued: "Warning. No item transport details."

Fields

Sales Company

These fields display the selected company and its description.

Item

These fields display the selected Item and its description.

Customer

If a customer has been selected, these fields display the customer code, delivery sequence and name.

Net Weight per Iss. Unit

Enter the [net weight](#) for an issue unit of the item. This is the weight of the item per selling unit and is used to calculate the weight capacities associated with transport requirements for this item. You set up the default in the item/stockroom profile.

Volume per Issue Unit

Enter the [volume](#) for an issue unit of the item. This is used to calculate the [volume](#) capacities associated with transport requirements for this item.

Item Tare Weight**Per Issue Unit**

Enter the item [tare weight](#) per issue unit. This is used to calculate the weight of any inner pack or shrink-wrapping associated with the item.

[Net Weight](#) Percentage

Enter the [net weight](#) percentage. This is the [tare weight](#) expressed as a percentage of the [net weight](#) and is used to calculate the weight of any inner pack or shrink-wrapping associated with the item.

Note: You can enter either the [tare weight](#) per issue unit or the [tare weight](#) percentage, but not both.

Quantity per Container

Enter the quantity of the item per default [container](#) (pallet, case or box). This is used to calculate the number of [containers](#) required.

Container Tare Weight

Enter the [tare weight](#) of the empty [container](#). This is used to calculate the weight of empty [containers](#).

Container Volume

Enter the [volume](#) of an empty [container](#).

Note: The [volume](#) and weight are assumed to be cumulative for the issue unit and the [container](#). If the [container](#) is a box, and therefore the item does not take up any extra space, set the issue [volume](#) to zero and the [container volume](#) to the [volume](#) of the box.

Standard Outer

You can optionally enter a [container](#) item that will be used as the standard outer in [volume](#) and [container](#) type summary calculations.

If a standard outer is entered, [Volume](#) per Issue Unit, Item [Tare Weight](#), Quantity per [Container](#), [Container Tare Weight](#) and [Container Volume](#) entered against a goods item are ignored in the calculation of [tare weights](#) and [containers](#). The [container tare weight](#) will be defined on the [container](#) item's transport profile. The only relevant [volume](#) will be the [container volume](#) of the standard outer.

You can use the prompt facility to select from the Standard Outer Selection pop-up.

Caution: If a standard outer is not entered, the weight, volumes and containers will be calculated as if the Detailed Container Summary flag were unchecked; that is, they will be based on the goods only. The weights and volumes of container items will be ignored.

Select **Update (F8)** to save the information, and to return to the Maintain Item Details Selection window.

Standard Outer Selection Pop-up

To display this pop-up, use the prompt facility on the Standard Outer field on the Maintain Item Transport Details window.

Use this pop-up to select a [container](#).

Options

Select

Use this to select a [container](#) to be used as the standard outer.

Select the required [container](#) to return the selected item to the Maintain Item Details Selection window.

Carrier Enquiry [25/TPM]

Use this enquiry to select and enquire on [carrier](#) codes and associated information. You must have defined all [carriers](#), whether internal or external:

Carrier Enquiry Selection Window

To display this window, select the [Carrier](#) Enquiry task.

Use this window to select a [carrier](#).

Fields

Carrier

Enter the internal or external [carrier](#) on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Press Enter to display the [Carrier](#) Enquiry Detail window.

Carrier Enquiry Detail Window

To display this window, enter or select a [carrier](#) and then press Enter on the [Carrier](#) Enquiry Selection window.

This window displays the contact and [rating](#) details for the selected [carrier](#).

Functions

Routes (F13)

Use this to display the [carrier routes](#).

Text (F21)

Use this to display internal text attached to the [carrier](#).

Select **Exit (F3)** to leave the enquiry.

Carrier Enquiry Route Restriction Pop-up

To display this pop-up, select **Routes (F13)** on the [Carrier](#) Enquiry Detail window.

This pop-up displays the [routes](#) that the [carrier](#) can use. If no [routes](#) are displayed, you can use the [carrier](#) for all [routes](#) for the transport company. The default [rate](#) method and code apply to all [routes](#) for this [carrier](#).

Select **Previous (F12)** to return to the [Carrier](#) Enquiry Detail window.

Delivery Profile Enquiry [28/TPM]

Use this enquiry to display the [delivery profiles](#). You must have defined all customer delivery points, including those which represent distribution centres.

Delivery Profile Enquiry Selection Window

To display this window, select the [Delivery Profile](#) Enquiry task.

Use this window to select the sales company and customer.

Fields**Sales Company**

Enter a sales company.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Customer

Enter a customer and delivery sequence.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Stockroom

Enter a stockroom.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

Enter or select a sales company, customer and delivery sequence and then press Enter to display the Customer [Delivery Profile](#) Enquiry Detail window.

Alternatively, enter or select a sales company and stockroom and then press Enter to display the Stockroom [Delivery Profile](#) Enquiry Detail window.

Customer Delivery Profile Enquiry Detail Window

To display this window, enter or select a sales company and customer and then press Enter on the [Delivery Profile](#) Enquiry Selection window.

Use this window to display the details of the [delivery profile](#) for the selected sales company and customer combination.

Functions

Delivery Time Slots (F13)

Use this to display the delivery times for the customer.

Text (F21)

Use this to display any internal text attached to the customer.

Select **Exit (F3)** to leave the enquiry.

Stockroom Delivery Profile Enquiry Detail Window

To display this window, enter or select a sales company and stockroom and then press Enter on the [Delivery Profile](#) Enquiry Selection window.

Use this window to display the details of the [delivery profile](#) for the selected sales company and stockroom combination.

Select **Exit (F3)** to leave the task.

Enquire On Delivery Time Slots Pop-up

To display this pop-up, select **Delivery [Time Slots](#) (F13)** on the [Delivery Profile](#) Enquiry Detail window.

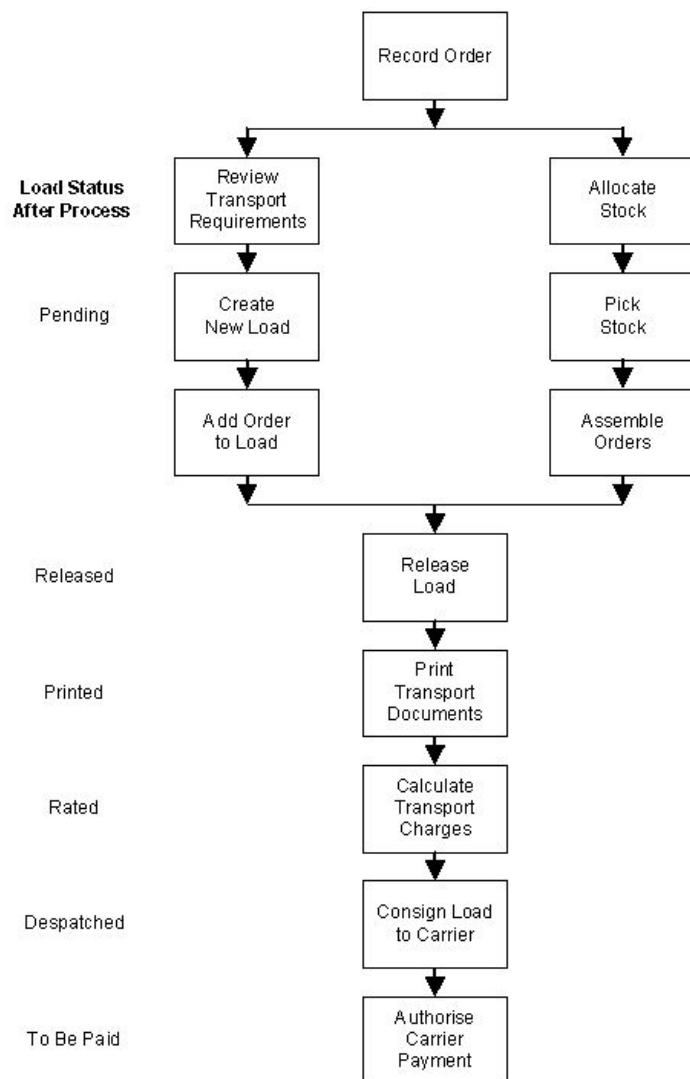
This pop-up displays the [time slots](#) during which the customer will accept deliveries.

Select **Previous (F12)** to return to the [Delivery Profile](#) Enquiry Detail window.

Chapter 3 Processing

Processing Introduction

The following diagram represents the business processes:



You can transfer the transport requirements of [orders](#) from Sales [Order](#) Processing to Transport Planning at any of the following points:

- Immediately after taking the [order](#)
- On allocation of stock
- On creation of pick notes
- On confirmation of despatch

If you are using the Customer Returns interface, you can also transfer the transport requirements of returns from Customer Returns to Transport Planning at any of the following points:

- Immediately after taking the return request
- On authorisation of the return request
- On printing the return request

Any under or over pick or despatch confirmation is automatically reflected in transport planning.

Transport requirements are not generated for the [container](#) lines on an [order](#) i.e. the process bypasses any [order](#) line with an [order](#) type that identifies it as an associated [container](#).

Note: [Load](#) planning is based on the quantity of finished product being shipped.

Note: [Container](#) lines are used to generate a detailed [container](#) summary for each transport requirement within the Build [Load](#) task if the Detailed [Container](#) Summary in Build [Loads](#) field has been checked for the [transport centre](#).

Transport planning then suggests [loads](#) onto which to build the [orders](#), if you have automated the building of [loads](#) for specific [transport centres](#), or you can build the [orders](#) manually onto the most suitable [loads](#). Note that there will be certain restrictions when carrying out this routine, for example [vehicle capacity](#).

You can assign [loads](#) to a [carrier](#) manually, via the Confirm [Load](#) Despatch window, or automatically, after printing and [rating](#) the [load](#) (if required).

You only need to match and authorise [carrier](#) invoices for [rated loads](#).

Finally, when the [load](#) has been despatched, you [drop](#) the [load](#) record to history, which you can use for future analysis.

Return Numbering

Customer returns do not have the equivalent of the sales [order](#) despatch note number. However, a collection may be split over more than one [load](#) and the part of the return on each [load](#) must be uniquely identified.

Returns are therefore processed using a suffix which appears similar to a despatch note number. The following system has been adopted throughout collection processing and is not mentioned explicitly in each section:

- 1 When a return is created, it will be given a suffix of -1 in Transport Planning. This shows up as blank in enquiries, etc.
- 2 Each time a return is confirmed as collected, the suffix is incremented by 1. This means that when the load with the first confirmed receipt on it is viewed, in an enquiry for example, the return will have suffix 00. If another receipt for that return is confirmed on another load, this will have suffix 01 etc.
- 3 The part of a return not yet received will keep the -1 suffix.

Caution: The maximum number of receipts for a given return is 100. If users attempt to receive a return more than 100 times, an error message will be issued. In this case, the quantities outstanding must be reduced to those already received and a new return created for the remainder.

Create Load Schedule [1/TPP]

Use this task to create new [loads](#) based on up to 12 [skeleton loads](#) at one time. The [load](#) header information, with any associated text, is copied from the [skeleton load](#) onto the new [load](#). The new [loads](#) are automatically given the next unused [load](#) number.

Create Load Schedule Date Window

To display this window, select the Create [Load](#) Schedule task.

Use this window to enter the [ship date](#) for the [load](#) you are creating.

Fields

Ship Date

Enter or select the planned [ship date](#) for the given [load](#). This defaults to the current date plus the [planner's](#) time fence days.

Press Enter to display the Create [Load](#) Schedule Details window.

Create Load Schedule Details Window

To display this window, enter or select a date and then press Enter on the Create [Load](#) Schedule Date window.

Use this window to create a [load](#) schedule for the [ship date](#), based on a specified [skeleton load](#).

Fields

Based on Load

Enter the [skeleton load](#) number to use to create the new [load](#).

If the based on [load](#) is a [master load](#), the sub-[loads](#) are created as well.

You can use the prompt facility to select from the Select [Route](#) and Select [Load](#) pop-ups.

Note: You must select a [route](#) before you can select a [skeleton load](#). If there is only one [skeleton load](#) for the [route](#), the software bypasses the [load](#) selection and displays the [load](#) reference.

Select **Submit (F8)** to build the [load](#).

Create Load [2/TPP]

Use this task to create a [load](#). When you create a [load](#) you are developing a framework for a delivery. Transport Planning can then fill the [load](#) with the [orders](#) that match the framework.

When you have a created a [load](#), it is at [Pending](#) status until it has [orders](#) built on to it.

You can create two types of [pending loads](#): a one-off [load](#) and a [skeleton load](#).

A one-off [load](#), once created, is ready to have [orders](#) built on it.

A [skeleton load](#) is only used as a basis for creating new [loads](#), which saves time when you are creating similar [loads](#) because you do not have to re-enter the same information. To create a [skeleton load](#), add a normal [load](#) header and then define it as a skeleton via Maintain [Loads](#), at which point any additional details and instructions are added to it. You cannot process [skeleton loads](#) further; that is, they cannot be released via Maintain [Loads](#).

Create Pending Load Pop-up

To display this pop-up, select the Create [Load](#) task.

Alternatively, select Create [Pending Load \(F13\)](#) on the Build [Loads Order](#) Detail window.

Fields

Load Number

Enter the [load](#) reference. This must be unique to a [transport centre](#) or transport company (depending on the company profile setting).

When you create [pending loads](#) via the Build [Loads](#) task or the Create [Load](#) Schedule task, Transport Planning assigns [load](#) numbers automatically, but you can override them.

Note: If you have set the code to begin with a letter prefix in the company profile and you override an automatically generated number, you must enter the code with same format.

Based on Load

Enter the [load](#) number of a [skeleton load](#) to use as a base for creating a new [load](#) number. This copies any [load](#) header information and associated text.

Note: Only use this field if you are creating a [load](#) based on a [skeleton load](#).

Ship Date

Enter or select the planned [ship date](#). The [ship date](#) defaults to the current date plus the [planner's](#) time fence days.

Route

Enter the [route](#) for the [load](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

You assign each customer or delivery point a particular [drop](#) sequence along a [route](#).

Carrier

Enter the internal or external [carrier](#) that is to handle the transport requirements.

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

If you leave this field blank, the default for the [route](#) is used.

Vehicle Type

Enter the type of [vehicle](#) for the [load](#).

Alternatively, use the prompt facility to select from the Select [Vehicle Type](#) pop-up.

You can define weight and [volume](#) capacities to [vehicle types](#).

If you leave this field blank, the default for the [route](#) is used.

Ship Time

Enter the [ship time](#) for a [load](#).

If you leave this field blank, the default for the [route](#) is used.

Note: This field does not act as a restriction when building [loads](#).

Select **Update (F8)** to save the [load](#) and to leave the task.

Build Loads [3/TPP]

Use this task to review a list of all requirements, including collection requirements, which have yet to be planned, onto a specific [load](#), (even though they may have a suggested [load](#) number).

You can amend collection, despatch note or [drop](#) requirements. These include accumulated collection or [order](#) requirements for a given customer, so you can assign requirements to specific [loads](#).

Consider the following when building [loads](#):

- Geographical location
- Limits on [carriers](#) and [container](#) types
- Delivery [time slots](#)
- Exclusive customer deliveries
- Temperature requirements
- Availability of [vehicle](#) and driver

If you have specified a [vehicle](#), Transport Planning checks that its [capacity](#) is not exceeded.

You can toggle between the review of all [orders](#) associated with a delivery point [drop](#) and the summarised [drop](#) requirement for the delivery point.

You can control the display of requirements via a range of [ship dates](#) together with one of the following criteria:

- [Route](#) or [drop](#) range
- [Carrier](#)
- [Origin](#)

Build Loads Detail

[Orders](#) with special instructions display an asterisk. These [orders](#) normally have external text recorded against them.

If a customer requires delivery confirmation, an asterisk is displayed against the customer delivery point code and customer name. If there are fixed delivery requirements, the delivery [time slots](#) and [planner](#) text assigned to the delivery point are highlighted.

Build Loads Selection Window

To display this window, select the Build [Loads](#) task.

Use this window to select the [load](#) requirements.

Fields

Ship Date/To

Enter or select the range of [ship dates](#) for which you want to review [orders](#). These fields default to the current date plus the [planner's](#) time fence days for planning.

Route From/Route To

Enter the range of [routes](#) for which you want to review [orders](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Drop

You can enter a [drop](#) within the specified [route](#) From and To [routes](#), in [order](#) to limit the [orders](#) displayed.

Carrier

Enter the [carrier](#) for which you want to review [orders](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the [origin](#) or start point for which you want to review [orders](#). You must have defined the [origin](#) as a transport [node](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the [destination](#) or end point for which you want to review [orders](#). You must have defined the [destination](#) as a transport [node](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Note: You only need to enter either a [route](#) and [drop](#) range, or a [carrier](#), or an [origin](#) and [destination](#).

View

Use this to indicate the transport requirements that you wish to view.

Select one of the following:

[Drops](#) (1) - To view [drops](#)

[Orders](#) (2) - To view [orders](#)

Returns (3) - To view returns

Note: If the Detailed [Container](#) Summary in Build [Loads](#) field in the Transport Planning company profile is checked, only options 2 and 3 are valid in the View field.

Preselect Drops

Select one of the following:

No (0) - To have no [drops](#) pre-selected for building

Yes (1) - To pre-select all [drops](#) for building on a suggested [load](#)

All [drops](#) on the Build [Loads](#) Detail window are pre-selected with **Select**.

Amend (2) - To pre-select all [drops](#) for amendment

All [drops](#) on the Build [Loads](#) Detail window are pre-selected with **Amend**.

Note: If the Detailed [Container](#) Summary in Build [Loads](#) field in the appropriate [transport centre](#) is checked, Amend is not available.

Press Enter to display either the Build [Loads](#) Detail or the Build [Loads](#) Detail (Detailed [Container](#) Summary) window.

Build Loads Detail Window

To display this window, press Enter on the Build [Loads](#) Selection window with the Detailed [Container](#) Summary in Build [Loads](#) field in the appropriate [transport centre](#) definition unchecked.

Use this window to select or amend the [load](#) details. You can toggle the display between [orders](#), [drops](#) and returns and the different capacities.

Note: The display varies depending on the selection criteria you entered on the selection window.

Note: If the Override [Capacity](#) Errors field in the [Planner](#) profile is left unchecked, you cannot plan a return on to a [load](#) with a different date from the return date.

Note: Warning: Collection requirements show associated weight, [volume](#) or [container](#) numbers for information only. These values are excluded from any [capacity](#) calculations for a [load](#). You must check manually that the [load](#) has the [capacity](#) required for planned collections.

Fields

Select

Select one of the following:

Select (1) - To add the [order](#), return or [drop](#) to the suggested [load](#)

Amend (2) - To amend suggested [load](#) details

You can transfer the [order](#), return or [drop](#) to another [load](#), or split it across multiple [loads](#).

[Load](#) Details (3) - To display the [Load](#) Details Enquiry for the suggested [load](#)

[Delivery Profile](#) (4) - To display the [Delivery Profile](#) Enquiry for the customer delivery point

[Order](#) Enquiry (5) - To display the Sales [Order](#) Details Enquiry

For more information, see the [Order](#) Entry product guide.

Note: [Order](#) Enquiry is only available if you are displaying the selection criteria by [order](#).

Return Enquiry (5) – To display the Return Summary Enquiry

For more information, see the Customer Returns product guide.

Note: Return Enquiry is only available if you are displaying the selection criteria by return.

Functions

Create Load (F13)

Use this to create new [loads](#). For more information, see the Create [Loads](#) section.

Drops/Orders/Returns (F14)

Use this to toggle between [drops](#), [orders](#) and returns information for customers.

Volume/Weight (F15)

Use this to toggle between [volume](#) and weight capacities for the transport requirements.

Pending Loads (F16)

Use this to display the [pending loads](#) headers that conform to the entered selection criteria, for example, [ship date](#), [route](#), [carrier](#) or [origin](#) and [destination](#).

Select **Update (F8)** to add the selected [orders](#), returns or [drops](#) to the [load](#) and then select **Exit (F3)** to leave the task.

Build Loads Detail (Detailed Container Summary) Window

To display this window, press Enter on the Build [Loads](#) Selection window with the Detailed [Container](#) Summary in Build [Loads](#) field in the appropriate [transport centre](#) definition checked.

Use this window to select the appropriate [load](#) for each transport requirement that matches the selection criteria entered on the Build [Loads](#) Selection window. You can toggle the display between [orders](#) and returns.

In some industry sectors, [load planners](#) are aware of the [capacity](#) of a [load](#) in terms of the number of different [container](#) items that can be planned onto it, i.e. the maximum number of kegs and pallets that can safely be shipped on a single [load](#).

Initial [load](#) planning is performed based on these criteria rather than total weight or [volume](#).

This Detailed [Container](#) Summary view is only shown when the Detailed [Container](#) Summary in Build [Loads](#) field is **checked** on the appropriate [transport centre](#) and replaces the Build [Loads](#) Detail window.

The [container](#) summary is split into a maximum of seven columns.

Which [container](#) quantities are accumulated into each column for each transport requirement is determined as follows:

- The set-up of the presentation details on the appropriate [transport centre](#). This defines which [container](#) types are to be shown and in which columns.
- The [container](#) types assigned to each [container](#) when the [container](#) is defined during item maintenance.

Note: The display varies depending on the selection criteria you entered on the selection window.

Note: If the Override [Capacity](#) Errors field in the [Planner](#) profile is left unchecked, you cannot plan a return on to a [load](#) with a different date from the return date.

Caution: Collection requirements show associated weight, volume or container numbers for information only. These values are excluded from any capacity calculations for a load. You must check manually that the load has the capacity required for planned collections.

Fields

Route

Enter a [route](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up. If more than one [load](#) has been created for your selected [route](#), the Select [Load](#) window will be displayed.

Load

Enter a [load](#).

Alternatively, use the prompt facility to select from the Select [Load](#) window.

Once selected, the date, [drops](#), [container](#) type summary and weight and [volume](#) of [orders](#) already assigned to this [load](#) will be displayed.

Select

Select one of the following:

Select (1) - To add the [order](#), return or [drop](#) to the suggested [load](#)

[Load](#) Details (2) - To display the [Load](#) Details Enquiry for the suggested [load](#)

[Delivery Profile](#) (3) - To display the [Delivery Profile](#) Enquiry for the customer delivery point

[Order](#) Enquiry (4) - To display the Sales [Order](#) Details Enquiry

For more information, see the [Order](#) Entry product guide.

Note: [Order](#) Enquiry is only available if you are displaying the selection criteria by [order](#).

Return Enquiry (4) - To display the Return Summary Enquiry

For more information, see the Customer Returns product guide.

Note: Return Enquiry is only available if you are displaying the selection criteria by return.

Ship Date

This field displays the [order ship date](#).

Ship Time

This field displays the [ship time](#) of the suggested [load](#).

Route

This field displays the current [route](#) for each shipment.

Enter a different [route](#) code to move the shipment to a different [route](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Load

This field is blank if there is no [load](#) associated with the [order](#).

It will display the current suggested [load](#) number for an [order](#) if one is found that matches the [ship date](#) and [route](#).

You can change the [load](#) here if other suitable [loads](#) are available.

You can use the prompt facility to select from the Select [Load](#) pop-up.

Order

This field displays the [order](#) number for this line.

Container Types

These fields display the total [containers](#) of each type for the [order](#).

Weight

This field displays the total weight of the goods on the [order](#), as defined on the item transport details.

Volume

This field displays the [volume](#) of the current [order](#).

Customer

This field displays the customer's name for the delivery address.

Order Text

This field displays the first line of any text entered against the [order](#).

Text

This field displays the first line of any text entered against the [delivery profile](#).

Functions**Create Load (F13)**

Use this to create new [loads](#). For more information, see the Create [Loads](#) section.

Orders/Returns (F14)

Use this to toggle between [orders](#) and returns information for customers.

Pending Loads (F16)

Use this to display the [pending loads](#) headers that conform to the entered selection criteria, for example, [ship date](#), [route](#), [carrier](#) or [origin](#) and [destination](#).

Select **Update (F8)** to add the selected [orders](#) or [drops](#) to the [load](#) and then select **Exit (F3)** to leave the task.

Amend Drop Requirement Pop-up

To display this pop-up, select Amend next to a [drop](#) on the Build [Loads](#) Detail window with the display set to [drops](#).

Use this pop-up to amend [drop](#) information, such as [route](#), [drop](#) sequence or [load](#) number. Any amendments made affect all [order](#) and return note requirements associated with the selected [drop](#).

Note: This pop-up is only available if the Detailed [Container](#) Summary in Build [Loads](#) field in the appropriate [transport centre](#) is left unchecked.

Fields

Route To

Enter the [route](#) to which to move the [drop](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Drop To

Enter the [drop](#) sequence assigned to the customer delivery point for the entered [route](#).

Load To

Enter the [load](#) number to which to assign to the [drop](#) details. If you leave this field blank, Transport Planning checks all [pending loads](#) for this [route](#), on this date. If Transport Planning only finds one [load](#), it displays the number. If it finds many [loads](#), you can select a [load](#) from the displayed pop-up.

Note: If the [drop](#) is no longer outstanding, you cannot make any more amendments.

Functions

Pending Loads (F16)

Use this to display the [loads](#) that conform to selection criteria such as [ship dates](#), [route](#) entered (all [routes](#) if blank), and all [carriers](#).

Select **Update (F8)** to save the entered information and return to the Build [Loads](#) Detail window.

Amend Transport Requirements Window

To display this pop-up, select Amend next to an [order](#) on the Build [Loads](#) Detail window (with the display set to [Orders](#)).

Alternatively, select **Amend** next to a return on the Build [Loads](#) Detail window (with the display set to Returns).

Use this pop-up to amend [order](#) or return information such as [route](#), [drop](#) sequence or [load](#).

Note: If the Override [Capacity Errors](#) field on the [planner](#) profile is left unchecked, you may not plan a return onto a [load](#) with a different date from the return date.

Transport requirements are not generated for the [container](#) lines on an [order](#) i.e. the process bypasses any [order](#) line with an [order](#) type that identifies it as an associated [container](#).

Note: This also amends the [drop](#) record, detailing total requirements at a delivery point. You cannot amend the weight, [volume](#) and [container](#) details until you have created the picking note.

Fields

Route

Enter the [route](#) for the [order](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Drop

Enter the [drop](#) sequence assigned to the customer delivery point.

Load Number

Enter the [load](#) number for the [order](#) requirements.

Gross Weight

Enter the [gross weight](#) for the [order](#) requirement.

Net Weight

Enter the total weight of the actual goods for the [order](#).

Tare Weight

Enter the total weight of the [containers](#).

Note: [Gross weight](#) must always equal the sum of net and [tare weight](#).

Volume

Enter the total [volume](#) for the [order](#) requirement.

Containers

Enter the total number of [containers](#) for the [order](#) requirement.

Functions**Lines (F14)**

Use this to display the [order](#) or return lines on the Display [Order](#) Lines pop-up.

Pending Loads (F16)

Use this to display the [pending loads](#) headers that conform to the selection criteria, for example, [ship dates](#), [route](#) entered (all [routes](#) if blank), and all [carriers](#). If a [route](#) is entered, only the [loads](#) for that [route](#) are displayed.

Note: Transport Planning refreshes [order](#) requirements to the latest detail. If the [order](#) is no longer outstanding you cannot make any more amendments.

Select **Update (F8)** to save the details and to return to the Build [Loads](#) Detail window.

Display Order Lines Window

To display this window, select **Lines (F14)** on the Amend Transport Requirements window.

Use this window to view the lines for an [order](#).

Note: The display varies depending on the selection criteria you entered on the selection window.

Options

Order Line Enquiry

Use this to display the [Order](#) Line Enquiry window.

Note: This function is only available if you are displaying the selection criteria by [order](#).

Return Line Enquiry

Use this to display the Return Line Enquiry window.

Note: This function is only available if you are displaying the selection criteria by return.

Select an [order](#) line with [Order](#) Line Enquiry to display the [Order](#) Line Enquiry window.

Alternatively, select a return line with Return Line Enquiry to display the Return Line Enquiry window.

Maintain Load [4/TPP]

Use this task to maintain [loads](#) once they have been processed either automatically by the software or manually using the Build [Loads](#) task.

You can:

- Review [load](#) header, [drop](#), [order](#)/return note information
- Move [drop](#), [order](#) and [order](#) line details, return and return line details onto new [loads](#) or new [routes](#) or both
- Amend [order](#) capacities (weights, [volumes](#) and number of [containers](#))
- Record [consignee](#) name and address details and external text
- Release the [load](#) and print the documentation

You can select the [loads](#) displayed by [ship date](#) and one of the following criteria:

- [Route](#)
- Particular [carrier](#)
- [Origin](#) or [destination](#)
- Particular [load](#)

You can only maintain a [load](#) if its status is [Pending](#). If you select a [load](#) at a more advanced state, you cannot amend its details until you have returned the [load](#) to the [Pending](#) status.

Note: If Confirm Collection has been processed for a [load](#) with returns on it, the status cannot be returned to [Pending](#) (i.e. it cannot be held).

Maintain Load Selection Window

To display this window, select the Maintain [Load](#) task.

Use this window to select the [load](#) you want to maintain.

Fields

Note: Only enter one of the following criteria.

Route

Enter the [route](#) for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter the [carrier](#) for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the [origin](#) or start point for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the [destination](#) or end point for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter the number of the [load](#) you want to maintain.

Note: Press Enter to display the [loads](#) that match the selection criteria. If only one [load](#) matches the selection criteria, that reference is displayed on the selection window.

Press Enter to display the Maintain [Load](#) Detail window.

Maintain Load Detail Window

To display this window, enter a [load](#) number and then press Enter on the Maintain [Load](#) Selection window.

Use this window below to maintain details for the selected [load](#). The window is shown for a [load](#) with a status of [Pending](#). There is a similar window for [loads](#) with other statuses.

Note: You cannot change any details on this window if you have released the [load](#) using **Release (F13)**.

Fields

Master Load

If this [load](#) is a sub-[load](#), enter the [load](#) number of the [master load](#).

The software accumulates the [capacity](#) requirements of the [master load](#) by summing those of its sub-[loads](#) and bases the [master load rate](#) on accumulated [capacity](#), plus any [drops](#) defined directly to the [master load](#). The [master load](#) normally has no [drops](#) associated with it.

The [master load](#) must be at a status of [Pending](#) to assign the current [load](#) as a sub-[load](#). When you are maintaining a [master load](#), "[Master Load](#)" is displayed at the top of the window. When you release a [master load](#), it automatically releases the sub-[loads](#). When you print the transport documentation for the [master load](#), it automatically prints those for the sub-[loads](#). Each sub-[load](#) is printed on the [master load](#) documentation. You should only release a [master load](#) when you have built all the sub-[loads](#) and you have confirmed as despatched all the associated [orders](#).

You can enter up to ten levels of [master load](#). A sub-[load](#) can be a [master load](#) in its own right. You should release [master loads](#) from the lowest level upward.

If this [load](#) is a [skeleton load](#), the [master load](#) must also be a skeleton.

Note: You cannot link a [load](#) to both a [master load](#) and a [consolidation load](#). A [master load](#) cannot be a [consolidation load](#).

Note: If you [rate](#) the [master load](#) and return the current [load](#) to a status of [Pending](#), you should re-print and re-[rate](#) the [master load](#) (when applicable) to reflect any amendments made to this sub-[load](#).

Consolidation Load

Enter an existing [load](#) number. The current [load](#) automatically becomes a [secondary load](#) to the specified [consolidation load](#). All consolidated [loads](#) must have the same [carrier](#), [rating method](#) and [rate code](#). The consolidation (primary) [load](#) must be at a status of [Pending](#) for you to assign the current [load](#) as a [secondary load](#) and you cannot link a [consolidation load](#) to another [consolidation load](#).

Transport Planning uses this to calculate a consolidated [rate](#) based on the total weight, [volume](#) or number of [containers](#). It then automatically apportions the calculated [rate](#) value over the primary and all [secondary loads](#), based on their relative weight, [volume](#) or number of [containers](#).

When you maintain the [primary load](#), "[Consolidated Load](#)" is displayed at the top of the window. The [consolidation load](#) can be any of the [loads](#) grouped together for [rating](#). It has no significance other than as a common reference for the group. Consolidation normally applies where you carry a number of [loads](#) together on a single [vehicle](#), possibly in separate compartments, with the [carrier](#) charging for a single [load](#).

Note: You cannot link a [load](#) to both a [master load](#) and a [consolidation load](#).

Note: If you have [rated](#) the consolidated [loads](#) and return any to a status of [Pending](#), Transport Planning suggests that they should be re-[rated](#).

Master Drop

Enter a [drop](#) number for the sub-[load](#). You have to complete this field if you have entered a [master load](#). It sequences the sub-[loads](#) when you display or print the [master load](#) and groups sub-[loads](#) when you [rate](#) the [master load](#).

Master Area

Enter the [area](#) to [drop](#) the sub-[load](#). You must enter a value if you want to [rate](#) a [master load](#) by [area](#).

Ship Date

Enter or select the required ship or despatch date for the [load](#).

Ship Time

Enter the [ship time](#) for the [load](#).

Route

Enter the [route](#) assigned to the [load](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter the internal or external [carrier](#) assigned to the [load](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Vehicle Type

Enter the type of [vehicle](#) to use for the [load](#).

Alternatively, use the prompt facility to select from the Select [Vehicle Type](#) pop-up.

Origin

Enter the start point for the [load](#). You must have defined the [origin](#) as a transport [node](#) or geographical location.

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the end point for the [load](#). You must have defined the [destination](#) as a transport [node](#) or geographical location.

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Vehicle

Enter the [vehicle](#) for the [load](#).

Seal Number

Enter the [seal number](#) for the [load](#). Use this for security tagging. It is printed on the bill of lading documentation.

Driver

Enter the driver for the [load](#).

Crew

Enter the second driver or driver's mate for the [load](#).

Temperatures

Enter the temperatures required for the [load](#).

If you enter a single temperature, the fixed temperature message defined to the [transport centre](#) is printed on the bill of lading.

If you enter two temperatures, the temperature range message defined to the [transport centre](#) is printed on the bill of lading.

Agent Contact

Enter the name of the contact at the [carrier](#).

Exclusive Load

Enter one of the following:

0 - If the [load](#) is not exclusive to one customer and contains requirements for more than one customer

1 - If the [load](#) consists of requirements for a single customer delivery point (based on its eight-character account code and three-character delivery sequence)

Skeleton Load

Enter one of the following:

0 - If this is not a [skeleton load](#)

1 - If this is a [skeleton load](#)

[Skeleton loads](#) contain the base [load](#) information you use to create [pending loads](#) or [load](#) schedules.

Bulk Pick Load

Enter one of the following:

0 - If the [load](#) is not eligible for bulk pick

1 - If the [load](#) is eligible for bulk pick

Payment Method

Enter the [payment method](#) for this [load](#).

Alternatively, use the prompt facility to select from the TPPM Freight [Payment Method](#) pop-up.

Confirmation

Enter one of the following:

0 - If you do not need to confirm the delivery time

1 - If you need to confirm the delivery time with the customer

2 - If you have confirmed the delivery time with the customer

P & L Override

Enter the Profit and Loss Account Number for this [load](#). You use this, in conjunction with the Advanced Financial Integrator, to post transport costs to the General Ledger.

You can use the prompt facility to select from the Select Account pop-up.

Rating Status

Enter one of the following:

0 - If [load rating](#) is not required

- 1 - If you automatically [rate](#) the [load](#)
- 2 - If you manually [rate](#) the [load](#)
- 3 - If you have [rated](#) the [load](#)

Rate Method

Enter one of the following:

- 01 - To calculate charges based on the [load's gross weight](#), [volume](#) or number of [containers](#), using a [rating](#) table
- 02 - To calculate charges for each [drop](#), based on the [gross weight](#), [volume](#) or number of [containers](#), using a [rating](#) table
- 03 - To calculate charges using a fixed [rate](#), based on the [gross weight](#), [volume](#) or number of [containers dropped](#) into each [area](#)
- 04 - To calculate charges based on the [gross weight](#), [volume](#) or number of [containers dropped](#) into each [area](#), using a [rating](#) table

Alternatively, use the prompt facility to select from the TPRM [Rating Method](#) pop-up.

Rate Code

Enter the [rate code](#) for the selected [rating method](#) and [carrier](#). This defines the [rating](#) criteria that are effective on a given date.

Alternatively, use the prompt facility to select from the Select [Rate Code](#) pop-up.

Bill Required

Enter one of the following:

- 0 - If you do not require a bill of lading, just a [load sheet](#)
- 1 - If you require a bill of lading and a [load sheet](#)

Bill Format

Enter one of the following:

- 01 - One document per [load](#)

The [capacity](#) totals are from the [load](#) header and the despatch notes are per [load](#).

- 02 - One document per [drop](#) or delivery point on [route](#)

The [capacity](#) totals and the despatch notes are per [drop](#) or delivery point.

- 03 - One document per [load](#)

The [capacity](#) totals are from the [load](#) header with one totals line per [drop](#). The despatch notes are for each [drop](#) or delivery point.

- 04 - One document per [load](#)

The [capacity](#) totals are per [area](#) and for the [load](#). The despatch notes are for the [load](#).

Use the Inventory Descriptions file, major type TPBL to support and maintain these formats.

You can use the prompt facility to select from the TPBL Bill of Lading Format pop-up.

Copies

Enter the number of copies of the bill of lading documentation you require.

Functions

Release (F13)

Use this to change the [load](#) status to Released. You can then print the required transport documentation for the [load](#). (This will be done immediately if you have **checked** the Print BOL/[Load Sheets](#) Immediately after [Load](#) Release field in the [Transport Centre](#) maintenance task.)

Note: If necessary, you can limit the ability to release [loads](#) to specific [planners](#).

When a [load](#) is released, a check is performed to ensure that all requirements planned onto that [load](#) are [ready for loading](#). Collection requirements are bypassed during this procedure.

Transport Planning updates the status of a [load](#) as follows when it is released:

- If a [load](#) requires automatic or [manual rating](#), Transport Planning updates the status to Awaiting [Rating](#).
- If a [load](#) does not require [rating](#) but requires confirmation of despatch, Transport Planning updates the status to Awaiting Confirmation of Despatch.
- If a [load](#) does not require [rating](#) or confirmation of despatch but contains collection requests, Transport Planning updates the status to Awaiting Confirmation of Returns.
- If a [load](#) does not require [rating](#) or confirmation of despatch and does not contain any collection requests, Transport Planning updates the status to Awaiting [Drop](#) to History. This means that the production of the bill completes the processing of a [load](#).

Hold (F13)

This is displayed when a [released load](#) has been selected. Use this to hold the [released load](#) and set its status back to [Pending](#). You can then amend the [load](#) details again.

You can re-set a [load's](#) status to [Pending](#) at any stage prior to posting [payments](#) for that [load](#) to General Ledger. If you have posted the [rating](#) details for the [load](#) to the General Ledger, via AFI, you need to enter a manual General Ledger journal to balance the postings.

Drops (F14)

Use this to display the [drops](#) for the [load](#). You can then select [drops](#) to move them to another [load](#), or remove [drops](#) and re-instate them as outstanding.

Orders (F15)

Use this to display the [orders](#) for a [load](#). You can amend the [orders](#), move them to another [load](#) or remove them from this [load](#).

Totals (F16)

Use this to display various totals for a [load](#).

Note: If the [load](#) is a [master load](#), the totals displayed do not include the capacities for the sub-[loads](#).

Sub-Loads/Consolidation Loads (F17)

If the current [load](#) is a [master load](#), use this to display the details of the [master load](#) and the sub-[loads](#) associated with it.

If the current [load](#) is a sub-[load](#), use this to display the sub-[load's](#) details.

If the current [load](#) is a primary [consolidation load](#), use this to display the details of the [consolidation load](#) and the [secondary loads](#) associated with it.

If the current [load](#) is a [secondary load](#), use this to display details of it.

Returns (F18)

Use this to display details of returns that are currently planned for this [load](#) on the Enquire on Returns for a [Load](#) window.

Consignee (F20)

Use this to enter the name and address details that you want to print on the bill of lading.

Text (F21)

Use this to enter [load](#) text. This is printed on all bill of lading documentation.

Select **Update (F8)** to save the details and to return to the Maintain [Load](#) Selection window.

Select Drops for a Load Window

To display this window, select **Drops (F14)** on the Maintain [Load](#) Detail window.

Use this window to select a [drop](#).

Options**Select**

Use this to select a [drop](#) for amendment.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry.

Select **Previous (F12)** to save any changes and to return to the Maintain [Load](#) Detail window.

Move Drop Details Pop-up

To display this pop-up, select a [drop](#) on the Select [Drops](#) for a [Load](#) window.

Use this pop-up to remove [drop](#) details or move [drops](#) onto a new [load](#).

Note: This also moves all [order](#) details associated with the [drop](#).

Fields

Route

Enter the [route](#) onto which to move the [drop](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Drop

Enter the [drop](#) sequence assigned to the customer delivery point for this [route](#).

Load

Enter the new [load](#) number for the [drop](#).

Note: If you enter a [route](#) or [drop](#) but leave the [load](#) blank, Transport Planning displays all [loads](#) associated with the [route](#) on the required date, so you can select the required [load](#).

Functions**Remove Drop (F11)**

Use this to remove the [drop](#) from the [load](#). This sets the [drop](#) status to Outstanding, and the [drop](#) is then visible within the Build [Loads](#) task. Transport Planning refreshes [drop](#) requirements to the latest details. If the [drop](#) is no longer on the [load](#) you cannot amend it.

Orders (F14)

Use this to display all the [orders](#) associated with the [drops](#) so you can move or amend them.

Pending Loads (F16)

Use this to display [pending load](#) headers that conform to the selection criteria such as [ship dates](#), [route](#) entered (all [routes](#) if blank), and all [carriers](#).

Press Enter to save the details and return to the Select [Drops](#) for a [Load](#) window.

Enquire on Orders for a Load Window

To display this window, select [Orders \(F15\)](#) on the Maintain [Load](#) Detail window.

Use this window to select the [orders](#) you want to move from the [load](#).

Options**Select**

Use this to select the [load](#) for amendment.

Amend

Use this to amend the [order](#) details.

Order Enquiry

Use this to view the [order](#) details.

Delivery Profile Enquiry

Use this to view the [delivery profile](#) for the customer.

Select an [order](#) to display the Move [Order](#) Details pop-up.

Load Totals Enquiry Pop-up

To display this pop-up, select **Totals (F16)** on the Maintain [Load](#) Detail window.

Use this pop-up to view various totals for a [load](#). The number of pick ups is displayed.

Functions

Availability/Totals (F15)

Use this to toggle between showing the totals and the availability.

Select **Previous (F12)** to return to the Maintain [Load](#) Detail window.

Move Order Details Pop-up

To display this pop-up, select an [order](#) on the Select [Orders](#) for a [Load](#) window.

Use this pop-up to remove [orders](#) from a [load](#) or move [orders](#) onto a new [load](#).

Note: This updates all [drop](#) details associated with the [order](#).

Fields

Route

Enter the [route](#) onto which to move the [order](#).

Drop

Enter the [drop](#) sequence to assign to the customer delivery point.

Load

Enter the [load](#) number onto which to move the [order](#).

If you enter a [route](#) or a [drop](#), and leave the [load](#) blank, Transport Planning displays all the [loads](#) associated with the [route](#) on the required date.

Functions

Remove Order (F11)

Use this to remove the [order](#) from the [load](#) and re-instate it as outstanding.

Lines (F14)

Use this to select specific [order](#) lines to move to a different [load](#).

Pending Loads (F16)

Use this to display the [pending loads](#) that meet the selection criteria such as [ship dates](#), [route](#) entered (all [routes](#) if blank), and all [carriers](#).

Press Enter to save the details and return to the Select [Orders](#) for a [Load](#) window.

Maintain Load Select Order Lines Window

To display this window, select **Lines (F14)** on the Move [Order](#) Details pop-up.

Use this window to select [order](#) lines to move from this [load](#).

Options**Select**

Use this to select the [order](#) line to move to a different [load](#).

Order Line Enquiry

Use this to view the [order](#) line details.

Select an [order](#) line to display the Move [Order](#) Line Details pop-up.

Move Order Line Details Pop-up

To display this pop-up, select an [order](#) line on the Maintain [Load](#) Select [Order](#) Lines window.

Use this pop-up to move [order](#) or despatch note line details onto a new [load](#) on a different [route](#).

Fields**Route**

Enter the [route](#) to which to move the [order](#) line.

Drop

Enter the [drop](#) sequence assigned to the customer delivery point.

Load

Enter the [load](#) number to which to move the [order](#) line.

If you enter a [route](#) or [drop](#) but leave the [load](#) blank, Transport Planning displays all [loads](#) associated with the [route](#) on the required date.

Functions**Remove Line (F11)**

Use this to remove the [order](#) line from the [load](#) and re-instate its requirements as outstanding.

Pending Loads (F16)

Use this to display the [pending load](#) headers that meet the selection criteria, such as [ship dates](#), [route](#) entered (all [routes](#) if blank), and all [carriers](#).

Select **Update (F8)** to save the details and to return to the Maintain [Load](#) Select [Order](#) Lines window.

Amend Order Details Pop-up

To display this pop-up, select Amend against an [order](#) on the Select [Orders](#) for a [Load](#) window.

Use this pop-up to maintain the [capacity](#) details for the [order](#) or despatch note requirements. You can also confirm the details as [ready for loading](#). (Transport Planning automatically does this when you confirm the [order](#) as despatched in Sales [Order](#) Processing or Warehousing).

Fields**Gross Weight**

Enter the [gross weight](#).

Net Weight

Enter the total weight of the actual goods.

Tare Weight

Enter the total weight of the [containers](#) for the [order](#).

Note: The [gross weight](#) must always equal the sum of the net and [tare weights](#).

Volume

Enter the total [volume](#) for the [order](#).

Containers

Enter the total number of [containers](#) for the [order](#) requirement.

Ready for Loading

Goods are considered ready for despatch when you have completed the Confirmation of Despatch routine.

Use this checkbox as follows:

Unchecked - If the goods are not ready to [load](#)

Checked - If the goods are ready to [load](#)

Functions**Lines (F14)**

Use this to display the [order](#) lines for the [load](#), so you can move them to another [load](#).

Select **Update (F8)** to save the details and to return to the Select [Orders](#) for a [Load](#) window.

Sub Loads Pop-up

To display this pop-up, select **Sub Loads (F17)** for a [master load](#) on the Maintain [Load](#) Detail window.

Use this pop-up to view the details of the [master load](#) plus the sub-[loads](#) associated with it.

The first line displays the [capacity](#) requirements for any [drops](#) directly associated with the [master load](#).

Functions

Volume (F14)

Use this to view the [volume](#) requirements of the [load](#).

Weight (F15)

Use this to view the weight requirements of the [load](#).

Containers (F16)

Use this to view the [container](#) requirements of the [load](#).

Select **Previous (F12)** to return to the Maintain [Load](#) Detail window.

Consolidation Details Pop-up

To display this pop-up, select **Consolidation Load (F17)** for a [consolidation load](#) on the Maintain [Load](#) Detail window.

Use this pop-up to view the details of the [consolidation load](#) and the [secondary loads](#) associated with it.

Functions

Volume (F14)

Use this to view the [volume](#) requirements of the [load](#).

Weight (F15)

Use this to view the weight requirements of the [load](#).

Containers (F16)

Use this to view the [container](#) requirements of the [load](#).

Select **Previous (F12)** to return to the Maintain [Load](#) Detail window.

Enquire on Returns for a Load Window

To display this window, select **Returns (F18)** on the Maintain [Load](#) Detail window.

Use this window to view returns for a [load](#).

Options

Select

Use this to move the return to another [route](#), [drop](#) or [load](#).

The Move Return Details pop-up is displayed.

Amend

Use this to maintain the weight, [volume](#) or [containers](#) for this return on the Amend Return Details pop-up.

Return Enquiry

Use this to display the Return by Return Number enquiry for the selected return.

Delivery Profile Enquiry

Use this to display the [delivery profile](#) for the customer returning the goods.

Note: *The Ready field is for information only and cannot be maintained here. It can be maintained in the Confirmation of Collection task.*

Select an option to display the appropriate window or pop-up.

Move Return Details Pop-up

To display this pop-up, select a return on the Enquire on Returns for a [Load](#) window.

Use this pop-up to move a return. You may remove it from this [load](#) or move it to another [pending load](#).

Fields

Route

Enter the new [route](#) for this return.

Drop

Enter the new [drop](#) for this return.

Load

Enter the new [load](#) number for the return.

Functions

Remove Return (F11)

Use this to remove the return. The return will no longer be planned on to any [load](#).

Lines (F14)

Use this to display the Select Return Lines window.

Pending (F16)

Use this to display all [pending loads](#) for that [route](#).

Note: Returns can only be moved on to a [load](#) which is at a status of [Pending](#). If an attempt is made to move a return on to a [load](#) of a higher status, an error message is displayed.

Select **Update (F8)** to update the values on this and return to the Enquire on Returns for a [Load](#) window.

Amend Return Details Pop-up

To display this pop-up, select Amend against a return on the Enquire on Returns for a [Load](#) window. Use this window to change return details.

Fields**Gross Weight**

Enter the [gross weight](#) of the return.

Net Weight

Enter the [net weight](#) of the return.

Tare Weight

Enter the [tare weight](#) of the return.

Volume

Enter the [volume](#) of the return.

Containers

Enter the [containers](#) for this return.

Functions**Return Lines (F14)**

Use this to display the Select Return Lines window.

Select **Update (F8)** to update the values and return to the Enquire on Returns for a [Load](#) window.

Select Return Lines Window

To display this window, select **Return Lines (F14)** on the Move Return Details pop-up or the Amend Return Details pop-up.

Use this window to change return details.

Options

Select

Use this to select return lines that may be moved to another [route drop](#) or [load](#) using the Move Return Line Details pop-up.

Return Line Enquiry

Use this to display the Return by Return Number enquiry.

Select a return line to display the Move Return Line Details pop-up.

Move Return Line Details Pop-up

To display this pop-up, select a return line on the Select Return Lines window.

Use this pop-up to move a return line. You may remove it from this [load](#) or move it to another [pending load](#).

Fields**Route**

Enter the new [route](#) for this line.

Drop

Enter the new [drop](#) for this line.

Load

Enter the new [load](#) number for the line.

Functions**Remove Line (F11)**

Use this to remove a line. The line will no longer be planned on to any [load](#).

Pending (F16)

Use this to display all [pending loads](#) for that [route](#).

Note: Returns can only be moved on to a [load](#) which is at a status of [pending](#). If an attempt is made to move a return on to a [load](#) of a higher status, an error message is displayed.

Select **Update (F8)** to update the values on this and return to the Select Return Lines window.

Consignee Details Pop-up

To display this pop-up, select **Consignee (F20)** Details on the Maintain [Load](#) Detail window.

Use this pop-up to enter the name and address details you want to print on the bill of lading.

Note: These details do not appear on Bill of Lading format 02 (one document per [drop](#) or delivery); it uses the delivery names and addresses.

Fields

Name

Enter the name to appear on the bill of lading.

Address

Enter the address to appear on the bill of lading.

Post Code

Enter the postcode to appear on the bill of lading.

Select **Update (F8)** to save the details and to return to the Maintain [Load](#) Detail window.

Release Loads [5/TPP]

The option **Release [Loads](#)** gives the facility to list and release multiple [loads](#).

Release Loads Invite Window.

Use this window to enter [load](#) selection criteria

Fields

Enter one of the following sets of criteria:

Ship Date

Enter or select the [ship date](#)

Route

Enter a [route](#) for the [ship date](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up

OR

Carrier

Enter a [carrier](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) popup.

OR

Origin

Enter the [origin](#) or start point for which you want to review [loads](#). You must have defined the [origin](#) as a transport [node](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the [destination](#) or end point for which you want to review [loads](#). You must have defined the [destination](#) as a transport [node](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

OR

Load Number

Enter the [load](#) number that you wish to release.

Enter the [load](#) selection criteria to continue to the Select [Loads](#) for Release window.

Select Loads for Release Window.

Enter a valid selection on the Release [Load](#) Invite panel. This window shows a list of [pending loads](#) that are available for release.

Options**Select (1)**

Select the [load](#) for review and release. The [load](#) detail view is shown and the user can select **F13** to release. Once a [load](#) is released it is removed from the Select [Loads](#) for Release Window.

Load details (2)

Select to view the [load](#) details.

Load totals (3)

Select to view the [load](#) totals.

Release any [loads](#) as required then **select Previous (F12)** to return to the invite screen, or **select Exit (F3)**.

Re-date Load [6/TPP]

The option allows the composite parts of a [load](#) to be re-dated with a later date.

Re-Date Loads Selection Window.

To display this window, select the **Re-date** [Load](#) task.

Use this window to select detail to help identify the [load](#).

Fields

Ship Date

Enter the planned [ship date](#) for the given [load](#).

Enter one of the following:

Route

Enter the [route](#) for the [load](#) you wish to re-date.

Alternatively, use the prompt facility to select from the Select [Route](#) popup.

Carrier

Enter the [carrier](#) for the [load](#) you wish to re-date.

Alternatively, use the prompt facility to select from the Select [Carrier](#) popup.

Origin

Enter the [origin](#) or start point for the [load](#) you wish to re-date.

Alternatively, use the prompt facility to select from the Select Transport Note popup.

Destination

Enter the [destination](#) or end point for the [load](#) you wish to re-date.

Alternatively, use the prompt facility to select from the Select Transport Note popup.

Load Number

Enter the [load](#) number for the [load](#) you wish to re-date.

Enter the selection criteria and continue to the Select [Load](#) for Re-date Window

Select Load for Re-date Window

Use this window to select a [load](#).

Options

Select (1)

The [load](#) should be re-dated. Select shows the user the Re-date [Loads](#) panel.

Load Details (2)

This shows the [Load](#) Details enquiry for the selected [load](#).

Load Totals (3)

This shows the [Load](#) Totals enquiry for the selected [load](#).

Select a [load](#) to allow the date to be changed.

Re-date Loads Window

Fields

New Shipping Date

Enter a valid date to change the [load](#) to.

New Shipping Time

Enter a valid time for re-dating the [load](#).

Reason for Change

Enter the reason for changing the date/time of the [load](#). A prompt is available.

Note: If the reason code used does not update the [order](#) date the result of this may be that the [order](#) is removed automatically from the [load](#).

Function

Process (F8)

This changes the dates on the [load](#), pick notes and sales [orders](#), based on the Reason for change value. The reason codes must be established for the Inventory Description major type TPRD, the limit value identifies the update date action to be taken:

0 – [Load](#) files only

1 – [Load](#) & Pick Notes

2 – [Load](#), Pick notes and Sales [Orders](#)

Select **Process (F8)** to update the [load](#).

Rate Loads Automatically [7/TPP]

Use this task to calculate the expected [carrier](#) charge for specified [loads](#) via a batch job. Collection requirements planned onto a [load](#) are not included in the [load rating](#) procedure. You can enter a [rate](#) method to select all [loads rated](#) by that particular method, for the specified [ship date](#).

You set up the [automatic rating](#) calculations with the [carrier rates](#). For more information, see the [Carrier Rate](#) section in the Maintenance chapter of this user guide.

The batch run produces an exception report, showing the details of all the [loads](#) it could not [rate](#).

You can only include [loads](#) on the batch job after you have printed the transport documentation and set the [rating](#) status to 1 ([Rated](#) Automatically).

For consolidated [loads](#), you can only select the [primary load](#), as Transport Planning automatically [rates](#) the associated [secondary loads](#).

For [master loads](#), you [rate](#) the sub-[loads](#) separately from the [master load](#), since the [carriers](#) and [rate](#) tables are often different.

To re-rate a load:

- 1 Use Maintain Loads to set the load back to a pending state, using **Hold (F13)**.
- 2 Make any required changes, re-set the rated flag, and re-release the load using Maintain Loads **Release (F13)**.
- 3 Print the bill of lading documentation or load sheets, or both.
- 4 Re-rate the load using the automatic or manual method.

Note: If you have posted the [load rate](#) value to the GL as an accrual, you must enter a manual journal (or journals) to balance this [original](#) value.

Transport Planning updates the status of a [load](#) after completing the [rating](#) process as follows:

- If a [load](#) requires confirmation of despatch, Transport Planning updates the status to Awaiting Confirmation of Despatch.
- If a [load](#) does not require confirmation of despatch but contains collection requests, Transport Planning updates the status to Awaiting Confirmation of Returns.
- If a [load](#) does not require confirmation of despatch and does not contain any collection requests, Transport Planning updates the status to Awaiting Authorisation of [Payment](#).

Rate Loads Automatically Window

To display this window, select the [Rate Loads](#) Automatically task.

Use this window to select the [loads](#) you want to [rate](#) automatically.

Fields

Ship Date

Enter or select the [ship date](#) for the [loads](#). This defaults to the current date plus the [planner's](#) time fence days.

Rate Method

Enter one of the following:

- 01 - [Load](#) and [rate](#) table
- 02 - [Drop](#) and [rate](#) table
- 03 - Fixed [rate](#) per [area](#)

04 - [Area](#) and [rate](#) table

Alternatively, use the prompt facility to select from the TPRM [Rating Method](#) pop-up.

Load Number

Enter the [load](#) reference that you want to [rate](#). The [load](#) must be at status 60 (Awaiting [Rating](#)).

Note: If you do not enter a [rate](#) method or [load](#) number, the batch job [rates](#) all [loads](#) requiring [rating](#) for the specified [ship date](#).

Functions

Printed Loads (F16)

Use this to display the [loads](#) that are awaiting [rating](#), for the entered [ship date](#).

Select **Submit (F8)** to submit the batch job.

Rate Load Manually [8/TPP]

Use this task to calculate the expected [carrier](#) charge manually for a selected [load](#).

Collection requirements planned onto a [load](#) are not included in the [load rating](#) procedure.

You must have printed the transport documentation and set the [rating](#) status to 2 ([Rate](#) Manually). If the status is 1, a warning message is displayed to suggest that you should automatically [rate](#) this [load](#). You can override this warning.

For consolidated [loads](#), the calculated grand total and [drop charges](#) are apportioned automatically across each of the [loads](#) based on their relative [capacity](#) (weight, [volume](#) or number of [containers](#)) and the number of [drops](#).

For [master loads](#), the calculated grand total is the total gross [capacity](#) (weight, [volume](#), or number of [containers](#)) of its sub-[loads](#) plus any customer [drops](#) directly assigned to the [master load](#) itself.

Transport Planning updates the status of a [load](#) after completing the [rating](#) process as follows:

- If a [load](#) requires confirmation of despatch, Transport Planning updates the status to Awaiting Confirmation of Despatch.
- If a [load](#) does not require confirmation of despatch but contains collection requests, Transport Planning updates the status to Awaiting Confirmation of Returns.
- If a [load](#) does not require confirmation of despatch and does not contain any collection requests, Transport Planning updates the status to Awaiting Authorisation of [Payment](#).

Rate Loads Manually Selection Window

To display this window, select the [Rate Load](#) Manually task.

Use this window to select the [loads](#) you want to [rate](#) manually.

Fields

Load Number

Enter the [load](#) number. The [load](#) must be at status 60 (Awaiting [Rating](#)) and it cannot be a consolidated [secondary load](#).

Functions

Printed Loads (F16)

Use this to display a list of all the [load](#) headers for the [loads](#) awaiting [rating](#).

Press Enter to display the [Rate Loads](#) Manually Detail window.

Rate Loads Manually Detail Window

To display this window, enter a [load](#) number and press Enter on the [Rate Loads](#) Manually Selection window.

Use this window to enter the details for the [loads](#) you want to [rate](#) manually.

If the [load](#) is a [master load](#), the window displays the legend [Master Load](#) and the number of sub-[loads](#). You can use [Sub Loads \(F18\)](#) to view the sub-[loads](#). The [capacity](#) (weight, [volume](#) or [containers](#)) is the consolidated [capacity](#) of all the sub-[loads](#), plus any customer [drops](#) assigned to the [master load](#).

If the [load](#) is a consolidation (primary) [load](#), the window displays the legend Consolidated [Load](#) and the number of [secondary loads](#). You can use [Consolidation \(F18\)](#) to view these [secondary loads](#). The [capacity](#) (weight, [volume](#) or [containers](#)) is the consolidated [capacity](#) of all these [loads](#).

Fields

Tax Code

Enter the tax code. If you have General Ledger attached, you must define the tax code to the General Ledger. If you do not have General Ledger attached, you must define the tax code in the Inventory Descriptions file under major type VAT.

You can use the prompt facility to select from the Tax Code Selection pop-up.

Note: Transport Planning only applies tax when you transfer the [carrier](#) invoice to Accounts Payable.

Rate

Enter the [rate](#) for a single unit of [capacity](#): [gross weight](#), [volume](#) or number of [containers](#), depending on the [capacity type](#).

Conversion Factor

Enter the [conversion factor](#). Transport Planning divides the [load's gross weight](#), [volume](#) or number of [containers](#) by this factor, before calculating a [rate](#) for a given quantity.

Minimum Weight

Enter the minimum weight. If the [load](#) is less than the minimum weight, Transport Planning calculates the [penalty](#) to add to the [rate](#).

Percentage/Surcharge Value

Enter a percentage or value to apply to the calculated [load](#) charges for unforeseen extras, such as government fuel tax charges.

Note: You can enter either a [surcharge](#) percentage or value, but not both.

Total Charges

If you have not entered a charge [rate](#), enter the [total charge](#).

If you have entered a charge [rate](#), the [total charge](#) is calculated as follows:

$(\text{Gross Weight} \times \text{Rate}) / \text{Conversion Factor}$

Drop Charges

Enter the fixed charge for the [drops](#). For master and consolidated [loads](#), duplicated [drop](#) numbers count as a single [drop](#). On [master loads](#), each sub-[load](#) counts as a [drop](#).

Penalties

This field displays the calculated [penalty](#) charge.

Surcharges

This field displays the calculated or entered [surcharge](#).

Load Grand Total

This field displays the [load grand total](#) charge. It is calculated as follows:

$\text{Total charge} + \text{drop charge} + \text{penalty charge} + \text{surcharge}$

Functions**Weight (F15)**

Use this to set the [capacity](#) to weight.

Volume (F16)

Use this to set the [capacity](#) to [volume](#).

Containers (F17)

Use this to set the [capacity](#) to [containers](#).

Consolidation Loads/Sub Loads (F18)

For a [primary load](#), use this to display the details of the [loads](#) consolidated together for [rating](#).

For a [master load](#), use this to display the details of the sub-[loads](#).

If the [load](#) is not a primary or [master load](#), this is not available.

Select **Update (F8)** to save the information and to return to the [Rate Loads](#) Manually Selection window.

Request Pick Notes [9/TPP]

Use this task to print pick notes based on a range of attributes. The warehouse personnel use this to optimise picks based on transport requirements or planned [loads](#).

Transport requirements are not generated for the [container](#) lines on a pick/despatch note; i.e. the process bypasses any pick/despatch line with an [order](#) type that identifies it as an associated [container](#).

The user requesting the generation of pick notes must have access rights to a bonded warehouse to generate any pick notes for that warehouse.

You produce pick notes per [order](#), but you can sequence them by [carrier](#), [route](#) or [load](#), with the [drop](#) sequence in ascending or descending [order](#).

Note: *If you install Warehouse Management, you can use the equivalent selections within the Request Picking List for Sales task. This produces a single consolidated pick list for the [carrier](#), [route](#) or [load](#) selected.*

Items can be specified as “bulk pick” items and then, as a by-product of the Transport Planning task to generate picking lists by [load](#), a separate bulk pick list for all of the bulk items on a [load](#) is produced. This can then be used to pick and despatch all products or the designated bulk pick products for the [load](#). As with pick note re-sequencing, the designation of what is considered a bulk pick item is optional and can be varied by stockroom.

In conjunction with the picking note re-sequence function (please refer to the OE product guide for further information regarding pick list sequencing), it is possible to specify items as bulk pick items at either company or stockroom level.

It is also possible to specify a break point code (2 characters) against any bulk pick item. When set, this will cause all of the items with the same code to appear on a separate bulk item picking note for a [load](#), i.e. all ‘AA’ items on the ‘AA’ list and all ‘AB’ items on the ‘AB’ list etc. (The default is **blank**.)

Confirmation of despatch will be performed by picking note, using the bulk picking note confirmation at [load](#) level option. However, POD will be performed at the sales [order](#) picking note level.

The task applies only to sales picking notes for normal stockroom depots (i.e. not warehouses).

There are two stages to this process, in that the number and contents of the picking notes is governed by whether there are any bulk pick items and/or whether there are any items that have specified break points for bulk lists.

The stages are therefore:

- 1 Extract all of the details for a load, look up and assign the sequencing criteria.
- 2 One detail note will be required for all non-bulk pick items.
- 3 Another will be required for each set of bulk pick items where the break point codes are different.

In the case of a totally bulk picked [load](#) (i.e. where the [load](#) is flagged as bulk pick), there will be no need for any non-bulk pick notes.

Lot Allocation

For a bonded warehouse, the automatic allocation of batch/lot/serial numbers does not occur for those items for which lot-control is forced i.e. items that are not flagged as batch-controlled, lot-controlled or serial-controlled.

Request Pick Notes Select Window

To display this window, select the Request Pick Notes task.

Use this window to select and sequence the pick notes that you want to create.

Items can be classified as bulk pick items at any level on the pick note sequencing tables.

Item overrides can be used to signify exceptional bulk pick item criteria with the same or different sequence details.

Note: *The bulk picking note function is only valid for the creation of picking notes by [load](#).*

The break point field is the primary sequence field. This is optional and, if specified, will produce a separate bulk pick list per sequence code. Where this field is specified for non-bulk items, it will be used as the primary sort key but will not trigger the production of multiple detailed picking notes. Please refer to the OE product guide for further information regarding pick list sequencing.

Fields

Pick Note Sequence

Select one of the following:

[Carrier](#) (1) - To sequence the pick notes by [carrier](#)

[Route](#) (2) - To sequence the pick notes by [route](#)

[Load](#) (3) - To sequence the pick notes by [load](#)

This field is mandatory; it is completed with the default sequence but you can override it.

Drop Sequence

Select one of the following:

Ascending (1) - To sequence the [drops](#) within the pick note sequence in ascending [order](#)

Descending (2) - To sequence the [drops](#) within the pick note sequence in descending [order](#)

This is only relevant if the pick note sequence is by [route](#) or [load](#) (to print pick notes in [route/drop](#) or [load/drop](#) sequence).

Selection

These are AND conditions; that is, an [order](#) line awaiting pick note request must meet all of the specified selection criteria. If a range is not specified, it is ignored. If a From value is specified

without a To value, all lines with a value less than the From value are ignored. Similarly, if a To value is specified without a From value, all lines with a value greater than the To value are ignored.

Note: *User must have access rights to bonded warehouses in the selected range*

Order From/To

Enter a range of sales company/[order](#) numbers. The sales company defaults from the company profile in Transport Planning. The [order](#) number(s) must be awaiting the request of a pick note; that is, have allocated lines not yet on a pick note.

You can use the prompt facility on the sales company part of these fields to select from the Select Sales Company pop-up.

Customer From/To

Enter a range of sales company/customer account/delivery sequence numbers. The sales company/customer account/delivery sequence combinations entered must be defined in Sales [Order](#) Processing.

You can use the prompt facility on the sales company part of these fields to select from the Select Sales Company pop-up.

You can use the prompt facility on the customer code part of these fields to select from the Select Customer pop-up.

Delivery Required Date From/To

Enter or select a valid range of due dates for [order](#) lines.

Carrier From/To

Enter a valid range of [carrier](#) codes.

You can use the prompt facility on these fields to select from the Select [Carrier](#) pop-up.

Route

Enter a valid range of [route](#) codes.

You can use the prompt facility on these fields to select from the Select [Route](#) pop-up.

Load

Enter a valid range of [load](#) numbers.

Providing you have made an entry or selection in one of the Delivery Required Date fields, you can use the prompt facility on these fields to select from the Select [Load](#) pop-up.

Bulk Pick Only

Select one of the following:

By Item (0) - To bulk pick by item

Force On (1) - To force bulk pick to be used

Force Off (2) - To force bulk pick not to be used

Obey [Load](#) (3) - To bulk pick using the [load](#) criteria

Print Labels

Use this checkbox as follows:

Unchecked - Not to print labels

Checked - To print labels

Level of Order Details

This flag is defaulted for all depots in a company to the value obtained from the Inventory Descriptions file under major type DFLT. A search argument, BPOD (Bulk Pick [Order](#) Details), will be used to define the default.

The Parameter Limit should be set to 1 or 2.

Select one of the following:

Summary (1) - To produce summary [order](#) information on a bulk pick list

Detail (2) - To produce detailed [order](#) information on a bulk pick list

The Parameter Limit value from the Inventory Descriptions file entry will be the default (with **Detail** being the setting either if no parameter has been set up or if the value is neither 1 nor 2).

The flag may be changed, but only **1** and **2** are valid values.

Reprint Bulk Pick Note

Enter a pick list to be re-printed.

Select **Submit (F8)** to confirm the selections made and submit the job for processing.

Confirm Bulk Pick [10/TPP]

Use this task to select a bulk pick list for despatch confirmation.

The user requesting the task must have access rights to a bonded warehouse to confirm the despatch of any pick notes for that warehouse.

Confirm Pick Selection Window

To display this window, select the Confirm Bulk Pick task.

Use this window to select the appropriate action to be taken for each OE pick note that makes up the selected bulk pick list. Options available for a pick note are:

1 – Confirm unamended pick

2 – Confirm amended pick

3 – Amend despatch details

9 – Cancel pick

Items can be classified as bulk pick items at any level on the pick note sequencing tables.

Item overrides can be used to signify exceptional bulk pick item criteria with the same or different sequence details.

Note: *The bulk picking note function is only valid for the creation of picking notes by [load](#).*

The break point field is the primary sequence field. This is optional and, if specified, will produce a separate bulk pick list per sequence code. Where this field is specified for non-bulk items, it will be used as the primary sort key but will not trigger the production of multiple detailed picking notes.

Fields

Load Number

Enter the [load](#) number.

Sequence Number

Enter the sequence number for the [load](#).

Despatch Method

Enter the despatch method to be used

Alternatively, use the prompt facility to select from the MODE Despatch Method pop-up.

Despatch Date

Enter the date for the despatch. This defaults to the current date.

Press Enter to display the Confirm Pick window.

Confirm Pick Window

To display this window, press Enter on the Confirm Bulk Pick Selection window.

The process of bulk pick note cancellation is still a function that is managed at sales [order](#) pick note level.

There is an option on the Confirm Bulk Pick window - **Cancel Pick**. When **Cancel Pick** is selected against a pick note, the existing function, as used to cancel an SOP-only pick note, is used to cancel the note and mop up allocation details etc.

Associated bulk pick details are also tidied up in synchronisation with this action.

It is possible, with care, to cancel some pick note details for some [orders](#) on a bulk pick list and confirm despatch of other [orders](#) on the bulk pick note.

A description (Cancelled) will appear for a pick note on the Confirm Pick window.

Fields

Select

Select one of the following:

Unamended (1)

Amended (2)

Note: *If the pick note stockroom requires short pick reasons to be entered then a window is displayed which allows the short pick reason code to be entered.*

Additional Details (3)

Cancel Pick (9)

The user must have access rights to a bonded warehouse in [order](#) to confirm or cancel the despatch of a pick note form that warehouse.

Select **Update (F8)**.

Enter Short Pick Reason Code Pop-up

To display this pop-up, select the Amend option from the Confirm Pick Window

Use this pop-up to enter a short pick reason code against the amended pick line.

Note: *The pop-up will only appear if the inventory description SPRS does not exclude the stockroom from having a short pick reason code*

Field**Short Pick Reason Code**

Select a short pick reason code.

Alternatively, use the prompt facility to select from the inventory description SPRC Short Pick Reason Code.

Note: *The code selected will be used as default in the Interactive Confirm Despatch if the pick line is short picked.*

Select **Update (F8)**.

Confirm Despatch of Load [11/TPP]

Use this task to date stamp a [load](#), to confirm that the [load](#) has left the [transport centre](#). This task can be bypassed if you **check** the Bypass Confirm [Load](#) Despatch field in the [Transport Centre](#) maintenance task.

Transport Planning updates the status of a [load](#) after confirming its despatch as follows:

- If a [load](#) contains collection requests, Transport Planning updates the status to Awaiting Confirmation of Returns.
- If a [load](#) does not contain any collection requests but has been [rated](#), Transport Planning updates the status to Awaiting Authorisation of [Payment](#).
- If a [load](#) does not contain any collection requests and has not been [rated](#), Transport Planning updates the status to Awaiting [Drop](#) to History.

Confirm Despatch of Load Selection Window

To display this window, select the Confirm Despatch of [Load](#) task.

Use this window to select the [load](#) you want to despatch.

Fields

Note: *You only need to enter one of the following selection criteria.*

Ship Date

Enter or select a [ship date](#) for the [loads](#).

Route

Enter the [route](#) for the [loads](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter the [carrier](#) for the [loads](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the [origin](#) or start point for the [loads](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the [destination](#) or end point for the [loads](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter a [load](#) reference.

Functions

Select Loads (F16)

Use this to display the [load](#) headers for printed, and where applicable, [rated](#), [loads](#) that conform to the selection criteria.

Press Enter to display the Confirm Despatch of [Load](#) Detail window.

Confirm Despatch of Load Detail Window

To display this window, press Enter on the Confirm Despatch of [Load](#) Selection window.

This window displays [load](#) header information for you to review and confirm.

Functions

Consignee (F20) Details

Use this to display the name and address details that print on the bill of lading.

Text (F21)

Use this to display the text which prints on the transport documentation.

Select **Update (F8)** to confirm the despatch of the [load](#).

Confirm Collection of Returns [12/TPP]

Use this task to confirm the collection of returns planned onto a [load](#) or to move uncollected returns onto another [load](#).

Transport Planning updates the status of a [load](#) after confirming collection as follows:

- If a [load](#) has been [rated](#), Transport Planning updates the status to Awaiting Authorisation of [Payment](#).
- If a [load](#) has not been [rated](#), Transport Planning updates the status to Awaiting [Drop](#) to History.

All returns lines on a [load](#) must be at a status of Ready before return collection can be confirmed. This is normally achieved by running the Returns Receiving task, which automatically updates the status of the return in Transport Planning. There is also a manual override for return lines, so they can be set to a status of Ready before Returns Receiving is complete.

Confirm Collection of Returns Selection Window

To display this window, select the Confirm Collection of Returns task.

Use this window to select the returns that are to have their collection confirmed.

Fields

Return Date

You must enter or select a valid date for the [loads](#).

Note: *You only enter one of the following four selection criteria.*

Route

Enter a [route](#) for the [loads](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter a [carrier](#) for the [loads](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter a valid [origin](#) or start point for the [load](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

You can enter a valid [destination](#) or end point for the [load](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter a valid [load](#) number.

Functions

Select Load (F16)

Use this to select [loads](#) with returns which are available for confirmation of returns, i.e. those [loads](#) with a status of Awaiting Confirmation of Collection, which also conform to the selection criteria entered.

Make your selections and then press Enter to display the Confirm Collection of Return Details window.

Confirm Collection of Returns Details Window

To display this window, make your selections and then press Enter on the Confirm Collection of Returns Selection window.

Once a [load](#) has been selected, the details are displayed for confirmation of collection.

Functions

Note: An error message will be issued if **Confirm (F8)** is selected and not all return lines on the [load](#) are ready for collection.

Edit Returns (F14)

Use this to display the Enquire on Returns for a [Load](#) window and view the expected returns for the [load](#).

Consignee (F20)

Use this to view the name and address details of the customer returning the goods.

Text (F21)

Use this to display the transport [load](#) text. If the [load](#) has a status of [Pending](#), the text can be maintained.

Select **Confirm (F8)** all returns on the [load](#). The status of the [load](#) will be set to Awaiting Authorisation of [Payment](#) or Awaiting [Drop](#) to History as described above.

Enquire on Returns for a Load Window

To display this window, select **Edit Returns (F14)** on the Confirm Collection of Return Details window.

Options**Select**

Use this to display the Move Return Details pop-up.

The lines can then be selected and moved to a new [route](#), [drop](#) or [load](#).

Amend

Use this to display the Amend Return Details pop-up.

This can be used to set the status to Ready.

Return Enquiry

Use this to display the Return Summary window.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry window.

Move Return Details Pop-up

To display the Move Return Details pop-up, select a line on the Enquire on Returns for a [Load](#) window.

Fields**Route**

Enter the new [route](#) for this line.

Drop

Enter the new [drop](#) for this line.

Load

Enter the new [load](#) number for the line.

Functions

Remove Return (F11)

Use this to remove a line or return. The line will no longer be planned on to any [load](#).

Lines (F14)

Use this to display the Select Return Lines window.

Pending (F16)

Use this to display all [pending loads](#) for that [route](#).

Select **Confirm (F8)** to confirm the changes made.

Note: Returns can only be moved onto a [load](#) which is at a status of [Pending](#). If an attempt is made to move a return on to a [load](#) of a higher status, an error message is displayed.

Note: If the [load](#) has progressed passed the status of [Pending](#) but is not yet complete, it can be put back to a status of [Pending](#) by holding the [load](#) in Maintain [Loads](#). Collections may then be added to it.

Amend Return Details Pop-up

To display this pop-up, select Amend against a line on the Enquire on Returns for a [Load](#) window.

Fields

Gross Weight

You can amend this value if necessary.

Net Weight

You can amend this value if necessary.

Tare Weight

You can amend this value if necessary.

Volume

You can amend this value if necessary.

Containers

You can amend this value if necessary.

Ready for Loading

Use this checkbox as follows:

Unchecked - If all lines for the return on this [load](#) are not ready

Checked - If all lines for the return on this [load](#) are ready

When all lines are ready, the [load](#) can be confirmed as collected.

Note: This checkbox is normally set by Returns Receiving but can be altered here if you want to process the load through payments before Return Receiving processing.

Caution: If you set a return to a status of Ready manually, and the load is then confirmed as collected, partial receipt will not be allowed in Returns Receiving and the customer must be credited with the full amount.

Functions

Lines (F14)

Use this to display the Select Return Lines window.

Select **Confirm (F8)** to confirm the changes made.

Note: Returns can only be moved onto a [load](#) which is at a status of [Pending](#). If an attempt is made to move a return on to a [load](#) of a higher status, an error message is displayed.

Note: If the [load](#) has progressed passed the status of [Pending](#) but is not yet complete, it can be put back to a status of [Pending](#) by holding the [load](#) in the Maintain [Load](#) task. Collections may then be added to it.

Select Return Lines Window

To display this window, select **Return Lines (F14)** on the Amend Return Details pop-up or the Move Return Details pop-up.

Options

Select

Use this to select return lines that may be moved to another [route drop](#) or [load](#) using the Move Return Line Details pop-up.

Return Line Enquiry

Use this to select return lines that may be moved to another [route drop](#) or [load](#) using the Move Return Line Details pop-up.

Select the appropriate option to display the next window...

Return Line Status Window

To display this window, select Return Line Enquiry against a line on the Select Return Lines window.

Functions

Invtry Units/Return Units (F11)

Use this to toggle between displaying inventory units and the return units.

Line Text (F21)

Use this to display the Line Text to Print on Return pop-up.

Select **Previous (F12)** to return to the Select Return Lines window.

Cancel Load [13/TPP]

Use this task to cancel [load](#) headers. This puts all associated transport requirements back to an outstanding state. You can review the transport requirements again using the Build [Loads](#) task.

You can cancel a [load](#) at any time up to the point of despatch. If the [load](#) has been printed and [rated](#), a warning message is displayed but you can override it. Once you cancel the [load](#), you can delete it using the Update [Load](#) History utility.

You can process cancellation [load](#) details via AFI to ensure that you can make balancing GL accrual postings (where the [load](#) has been [rated](#) and posted).

When you try to cancel a [secondary load](#), if the [primary load](#) has been [rated](#), Transport Planning issues a warning message to suggest that the [primary load](#) should be re-[rated](#). You cannot cancel a [primary load](#) whilst [secondary loads](#) are still attached.

The same rules apply for master and sub-[loads](#) as for primary and secondary consolidated [loads](#). Also, if you have printed the [master load](#), the warning suggests that you re-print it if you cancel any sub-[loads](#).

Cancel Load Selection Window

To display this window, select the Cancel [Load](#) task.

Use this window to select the [load](#) you want to cancel.

Fields

Note: *You only have to complete one of the following selection criteria.*

Ship Date

Enter or select the [ship date](#) for the [load](#). The default is the current date.

Route

Enter the [route](#) for the [load](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter the [carrier](#) for the [load](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the [origin](#) or start point for the [load](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the [destination](#) or end point for the [load](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter the number of the [load](#) you want to cancel.

Functions**Select Loads (F16)**

Use this to display [loads](#) that conform to the selection criteria irrespective of their status. This does not display [loads dropped](#) to history or posted to GL via AFI.

Enter your criteria and then press Enter to display the Cancel [Load](#) Detail window.

Cancel Load Detail Window

To display this window, press Enter on the Cancel [Load](#) Selection window.

This window displays [load](#) header information for you to review and confirm.

Functions**Consignee (F20) Details**

Use this to view the name and address printed on the bill of lading.

Text (F21)

Use this to view the text printed on the bill of lading and [load sheets](#).

Select **Update (F8)** to cancel the [load](#) and display the Cancellation Reason pop-up.

Cancellation Reason Pop-up

To display this pop-up, select **Update (F8)** on the Cancel [Load](#) Detail window.

Use this pop-up to enter a reason for the cancellation.

Fields**Reason Code**

Enter the reason for the cancellation

Alternatively, use the prompt facility to select from the RSNC Reason Code pop-up.
Select **Update (F8)** to save the details and to return to the Cancel [Load](#) Selection window.

Authorise Payments [14/TPP]

Use this to match and record [payments](#), on receipt of an external [carrier's](#) invoice. You match invoice details against the calculated [load](#) charges. If there is any discrepancy, authorised users can authorise the [payment](#). Once authorised, Transport Planning automatically transfers the invoice and [load](#) details to the invoice log in Accounts Payable (if installed). In addition, you can update accrual accounts within the General Ledger if you have Advanced Financial Integrator installed.

When authorising multiple [loads](#) to a single [carrier](#) invoice, you can transfer one invoice or one invoice per [load](#) to Accounts Payable. This depends on the setting of the appropriate flag on the company profile.

Once authorised, the [load](#) status is updated so you can [drop](#) it to history.

Note: For consolidated [loads](#), you cannot authorise the [secondary load](#) if you have not [rated](#) the [primary load](#).

The Authorise [Manual Payments](#) task (8/TPP) is identical in functionality and displays the same windows, except that that you do not need to match the [carrier](#) invoice and the [load](#) completes without posting the invoice, since it is settled.

Authorise Payments Carrier Selection Window

To display this window, select the [Authorise Payments](#) task.

This window and subsequent windows are also displayed when you select the Authorise [Manual Payments](#) task.

Use this window to select the [carrier](#) for which to [authorise payments](#).

Fields

Carrier

Enter the external [carrier](#) which has sent the invoice.

Press Enter to display the [Authorise Payments](#) Invoice Details window.

Authorise Payments Invoice Details Window

To display this window, press Enter on the [Authorise Payments Carrier](#) Selection window.

Use this window to enter the [payment](#) and invoice details for the selected [carrier](#).

Fields

Carrier Invoice Number

Enter the invoice number.

Carrier Invoice Date

Enter or select the date of the invoice.

Invoiced Freight Amount

Enter the total amount detailed on the invoice. This can be zero for free of charge.

Load Number

If there is only one [load](#) on the invoice, enter the [load](#) reference. The [load](#) must be at status 80 (Awaiting Authorisation of [Payments](#)).

Load Number Range

If the invoice has multiple [loads](#), enter the range of [load](#) numbers.

Note: If you leave both the [Load](#) Number and the [Load](#) Number Range fields blank, Transport Planning considers all [loads](#) awaiting [payment](#).

Ship Date Range

When you are matching to multiple [loads](#), you can enter or select a range of [ship dates](#). If you leave this field blank, Transport Planning considers all [ship dates](#).

Auto Authorise

Select one of the following:

No (0) - To select the [loads](#) manually for authorisation

Yes (1) - To set all selected [loads](#) to authorise on the [Authorise Payments Load](#) List window

Functions

Unpaid Loads (F16)

Use this to display all the [loads](#) that match to the selection criteria.

Press Enter to display the [Authorise Payments](#) Details window.

Authorise Payments Details Window

To display this window, enter a single [load](#) number and then press Enter on the [Authorise Payments](#) Invoice Details window.

Use this window to enter the [payment](#) details for an invoice for a single [load](#).

Fields

Payment Amount Excluding Tax

Enter the amount, excluding tax, to authorise for [payment](#). This is normally equal to the calculated amount and the invoiced amount.

Note: If the [payment](#) amount is not the same as the calculated charge amount, Transport Planning displays an additional adjustment window. If there is no adjustment, the [payment](#) is transferred to the Accounts Payable invoice log.

Payment Reference

Enter the [payment](#) reference to associate with the [payment](#) to the [carrier](#). You can carry this reference forward into the financial systems for reference. This defaults to the [load](#) reference.

Select **Update (F8)** to authorise the [payment](#).

Authorise Payments Load List Window

To display this window, press Enter on the [Authorise Payments](#) Invoice Details window.

Use this window to select the [load](#) or [loads](#) for which to [authorise payments](#).

Options**Authorise**

Use this to select the [load](#) for authorisation when you select **Update (F8)**, confirming the [payment](#) value to be made to the [carrier](#).

Enquire

Use this to display the [Load](#) Details Enquiry window.

Adjust

Use this to display the [Payment](#) Adjustment Details window, so you can change the [payment](#) amount.

Deselect

Use this to remove the [load](#) from the list of [loads](#) to authorise.

Functions**Addition (F14)**

Use this to add [loads](#) awaiting [payment](#) to the list.

Fold (F15)

Use this to display the capacities for the [loads](#).

Select **Update (F8)** to display the [Authorise Payments](#) Summary window.

Authorise Payments Summary Window

To display this window, select at least one [load](#) and then select **Update (F8)** on the [Authorise Payments Load](#) List window.

Use this window to enter the [payment](#) reference.

Fields

Payment Reference

Enter a [payment](#) reference for this group of [loads](#). Transport Planning passes this reference to the ledgers.

Select **Update (F8)** to update the selected [loads](#) and transfer the invoice details to the Accounts Payable invoice log as a matched invoice.

Authorise Payments Add New Loads

To display this window, select **Addition (F14)** on the [Authorise Payments Load](#) List window.

Use this window to add [loads](#) awaiting [payment](#) to the list to authorise.

Fields

Load Number

Enter the [load](#) number you want to add to the list of [loads](#) to authorise.

Select **Update (F8)** to add the entered [loads](#) to the [load](#) list and return to the [Authorise Payments Load](#) List window.

Authorise Adjustments Pop-up

To display this pop-up, enter different [payment](#) and calculated amounts and then select **Update (F8)** on the [Authorise Payments](#) Details window.

Use this pop-up to enter the adjustment reason and reference.

Fields

Adjustment Reason

Enter a reason for the adjustment

Alternatively, use the prompt facility to select from the TPAR Adjustment Reasons pop-up.

You set up reasons for adjustment in the Inventory Descriptions file under major type TPAR.

You can use this for analysis purposes or to control the posting of adjustments to the General Ledger via AFI.

Adjustment Reference

Enter a reference for the adjustment.

Authorise Payments Authorisation Warning

If there is a discrepancy between the calculated charges and the entered [payment](#) amount and you are not authorised to make [payment](#) adjustments, a warning is displayed.

Note: You can bypass the [payment](#) entry by selecting OK. If you enter the [payment](#) details, a user authorised to make adjustments must review the details before you can complete the [payment](#) transaction (via this [Authorise Payments](#) task).

Select **Update (F8)** to update the [payment](#) and adjustment details.

Authorise Manual Payments [15/TPP]

Use this task when you have paid the [carrier](#) directly through Accounts Payable for delivery of a [load](#). This task is the same as the [Authorise Payments](#) task, where you can authorise single or multiple [loads](#). The only difference is that you do not need to match the [carrier](#) invoice and the [load](#) completes without posting the invoice, since it is settled. For more information, see the [Authorise Payments Carrier](#) Selection Window section.

Create Requirements (TP Centre) [20/TPP]

Use this task to transfer [order](#) and return requirements into Transport Planning when the [order](#) lines' due date or expected return date falls on or inside the time fence horizon. The time fence is the current date plus the transport requirement lead time defined on the company profile.

You should use the transport requirement lead time to:

- Avoid passing [order](#) lines for which you do not yet need to plan the transport requirements
- Avoid processing return lines scheduled for collection in the future that as yet do not require the planning of transport requirements

You only need to select this task when you have set the transport requirement lead time to a value other than the default value of zero.

This task processes requirements for the user's [transport centre](#) only and may be run as required.

Transport requirements are not generated for the [container](#) lines on an [order](#); i.e. the process bypasses any [order](#) line with an [order](#) type that identifies it as an associated [container](#).

Note: [Load](#) planning is based on the quantity of finished product being shipped.

Note: [Container](#) lines are used to generate a detailed [container](#) summary for each transport requirement within the Build [Loads](#) task if the Detailed [Container](#) Summary in Build [Loads](#) field is checked for the appropriate [transport centre](#).

You can schedule the task to run automatically.

This task only considers [order](#) requirements within the [transport centre](#) currently being used.

Select Confirm **Submit (F8)** to run the batch job.

Manual Requirements [21/TPP]

Use this task to add requirements that are not already included on an [order](#).

Typically this is where you optimise a [load](#) by carrying [loads](#) for a third party, for example, another company which has insufficient transport [capacity](#). In this case, the [order](#) belongs to the third party and is not known to Transport Planning. You add it to Transport Planning via this task, so that you can plan its delivery.

Manual Requirement Creation Window

To display this window, select the [Manual Requirements](#) task.

Use this window to enter up to five new requirements for a customer. You can immediately add these requirements to a specified [load](#) or leave them as outstanding, so that you can plan them via the Build [Loads](#) task.

You have to use the Build [Loads](#) task or Maintain [Load](#) task to amend these requirements.

Fields

Miscellaneous Order Number

Enter an [order](#) number. This is used for reference only.

Sales Company

Enter a sales company.

Alternatively, use the prompt facility to select from the Select Sales Company pop-up.

Customer

Enter a customer account and delivery sequence. It must have a [delivery profile](#) defined within Transport Planning.

Alternatively, use the prompt facility to select from the Select Customer pop-up.

Date

Enter or select a [ship date](#) for the [load](#). The default is the current date.

Route

Enter the [route](#) for the [order](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Item/Requirement

Enter or an item code.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

You can enter up to five lines of requirement per requirement number.

The title of this field depends upon which version of the window you are displaying (you can select **Requirements/Items (F15)** to change the display). If this field is Item, you must enter a valid inventory item code. If this field is Requirement, you can enter a non-stocked item.

Weight

Enter the [gross weight](#) of the item.

Volume

Enter the [volume](#) of the item.

Cont.

Enter the number of [containers](#) for the item.

Assign to Load

Enter an [outstanding load](#) to which to add the requirements.

Alternatively, use the prompt facility to select from the Select [Load](#) pop-up.

If you leave this field blank, the requirements are outstanding and therefore available to the Build [Loads](#) task.

Note: If either the [route](#) or the [ship date](#) for the [load](#) does not match the details on the window, Transport Planning issues a warning message.

Drop Sequence

Enter a [drop](#) sequence if you have entered a [load](#).

Functions**Copy Previous Order (F5)**

Use this to copy the [manual requirement](#) entered previously and use it as the basis for the current requirement. This is only available when you have already entered a requirement and not left the window.

Requirements/Items (F15)

Use this to toggle between entry of requirements as descriptions or as item codes.

Select **Update (F8)** to add the [manual requirement](#).

Change Default Transport Centre [80/TPP]

Use this task to select the [transport centre](#) you want to process. This is the centre for which you maintain [loads](#), build [loads](#) and [authorise payments](#).

Note: If you want to make changes to the [loads](#), you must be authorised to the [transport centre](#). Use the [Planner](#) Profile utility task to authorise [planners](#) to a [transport centre](#).

Change Default Transport Centre Pop-up

To display this pop-up, select the Change Default Transport Cent. task.

Use this pop-up to select the [transport centre](#) for which you want to process [loads](#).

Fields

Position To

Enter the [transport centre](#) on which you want to position the cursor.

Options

Select

Use this to select the [transport centre](#) you want to set as your default [transport centre](#).

Press Enter to set the default [transport centre](#) and leave the task.

Chapter 4 Enquiries

Introduction to Transport Planning Enquiries

You can group enquiries into three categories:

- Planning - What is to be done?
- Static Information - What are the parameters?
- Status - How far through the process is the [load](#)?

Planning Enquiries

The [Outstanding Loads](#) Enquiry displays [orders](#) not included on [loads](#).

If you select a range of dates, this enquiry shows the future outstanding requirements requiring planning of transport.

Static Information

You can view details for the following:

- [Carriers](#)
- [Carrier route](#) restrictions
- [Delivery profiles](#)
- Delivery [time slots](#)

Status Enquiries

You can view the following [load](#) details:

- [Pending loads](#) ([loads](#) not yet released)
- [Load](#) details ([load](#) header information)
- [Load drops](#) (all [drop](#) details for selected [load](#))
- [Load orders](#) (all [orders](#) for selected [load](#))
- [Load consignee](#) ([consignee](#) details for selected [load](#))
- [Load](#) totals (quantity/value totals for selected [load](#))

You can use the [Loads](#) by [Order](#) Enquiry to view the current status of an [order](#). This includes any [loads](#) to which the [order](#) is assigned. Select one of the [loads](#) to access the [load](#) enquiries directly.

Outstanding Orders and Returns [1/TPE]

Use this task to review outstanding [drops](#), [orders](#) and returns, depending on the view selected, that are awaiting assignment to specific [loads](#). Transport Planning presents the details in the same way as it does in the Build [Loads](#) task.

Enquire On Outstanding Requirements Selection Window

To display this window, select the Outstanding [Orders](#) and Returns task.

Use this window to select the outstanding [orders](#) or returns for which you want to display the details.

Fields

Ship Date/To

Enter or select the [ship date](#) range for which you want to review [orders](#). These fields default to the current date plus the [planner's](#) time fence days for planning.

Note: *You only need to enter one of the three sets of selection criteria.*

Route From/RouteTo

Enter the range of [routes](#) for which you want to review [order](#) requirements.

You can use the prompt facility on these fields to select from the Select [Route](#) pop-up.

Drop (Sequence From)/Drop (Sequence To)

Enter the range of [drop](#) sequences for which you want to review [order](#) requirements for a particular [route](#).

Carrier

Enter the internal or external [carrier](#) for which you want to review [orders](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the start point for which you want to review [orders](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the end point for which you want to review [orders](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

View

Select one of the following:

[Drops](#) (1) - To view [drops](#), displaying the Enquire on Outstanding [Drops](#) window

[Orders](#) (2) - To view [orders](#), displaying the Enquire on Outstanding [Orders](#) window

Returns (3) - To view returns, displaying the Enquire on Outstanding Returns window

Enter your criteria, select [Drops](#) in the View field and then press Enter to display the Enquire on Outstanding [Drops](#) window.

Enter your criteria, select [Orders](#) in the View field and then press Enter to display the Enquire on Outstanding [Orders](#) window.

Enter your criteria, select **Returns** in the View field and then press Enter to display the Enquire on Outstanding Returns window.

Enquire on Outstanding Drops Window

To display this window, enter your criteria, select [Drops](#) in the View field and then press Enter on the Enquire on Outstanding [Orders](#) and Returns Selection window.

This window displays the customer, [route](#), [drop](#) and [gross weight](#) of all outstanding [drops](#).

Options

Load Details

Use this to display the [Load](#) Details Enquiry window.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry window.

Note: Where the customer has no [delivery profile](#) defined, details for the appropriate stockroom [delivery profile](#) are displayed.

Note: Transport Planning selects the outstanding [order](#) requirements according to the [original](#) selection criteria you entered.

Functions

Drops/Orders/Returns (F14)

Use this to toggle between displaying the returns, [drops](#) and [orders](#) for the range selected on the first window.

Volume/Weight (F16)

Use this to toggle the display between [volume](#) and [gross weight](#) capacities for transport requirements.

Pending Loads (F16)

Use this to display all [loads](#) with a status of [Pending](#).

Select **Exit (F3)** to leave the enquiry.

Enquire on Outstanding Orders Window

To display this window, enter your selection criteria, select [Orders](#) in the View field and then press Enter on the Enquire on Outstanding [Orders](#) and Returns Selection window.

This window displays the customer, [route](#), [drop](#) and [gross weight](#) of all outstanding [orders](#).

Options

Load Details

Use this to display the [Load](#) Details Enquiry window.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry window.

Order Enquiry

Use this to display the [Order](#) Enquiry window.

Note: *Transport Planning selects the outstanding [order](#) requirements according to the [original](#) selection criteria you entered.*

Functions

Drops/Orders/Returns (F14)

Use this to toggle between displaying the returns, [drops](#) and [orders](#) for the range selected on the first window.

Volume/Weight (F16)

Use this to toggle the display between [volume](#) and [gross weight](#) capacities for transport requirements.

Pending Loads (F16)

Use this to display all [loads](#) with a status of [Pending](#).

Select **Exit (F3)** to leave the enquiry.

Enquire on Outstanding Returns Window

To display this window, enter your selection criteria, select Returns in the View field and then press Enter on the Enquire on Outstanding [Orders](#) and Returns Selection window.

This window displays the customer, [route](#), [drop](#) and [gross weight](#) of all outstanding returns.

Options

Load Details

Use this to display the [Load](#) Details Enquiry window.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry window.

Return Enquiry

Use this to display the Return Summary window.

Note: *Transport Planning selects the outstanding return requirements according to the [original](#) selection criteria you entered.*

Functions**Drops/Orders/Returns (F14)**

Use this to toggle between the returns, [drops](#) and [orders](#) display for the selected range entered on the first panel.

Volume/Weight (F16)

Use this to toggle the display between [volume](#) and [gross weight](#) capacities for transport requirements.

Pending Loads (F16)

Use this to display all [loads](#) with a status of [pending](#).

Select **Exit (F3)** to leave the enquiry.

Load Details [2/TPE]

Use this enquiry to review [loads](#) at various stages through their process. You can review [load](#) details, [drops](#) and [order](#) information.

You can access most of the windows in this enquiry from several different tasks and functions and from the [Loads](#) by [Order](#) Enquiry. The product information only includes one access method for each window.

Load Details Enquiry Selection Window

To display this window, select the [Load](#) Details task.

Use this window to enter the selection criteria for the [Load](#) Details enquiry.

Fields**Ship Date/To**

Enter or select the [ship date](#) range for which you want to review [orders](#). These fields default to the current date plus the [planner's](#) time fence days for planning.

Load Status/To

Enter a range of transport [load](#) statuses on which to enquire.

You can use the prompt facility on these fields to select from the TPLS [Load](#) Status pop-up.

Route From/Route To

Enter the [route](#) range for which you want to review [loads](#).

You can use the prompt facility on these fields to select from the Select [Route](#) pop-up.

Drop/Drop

Enter the [drop](#) range, assigned to a delivery point along a particular [route](#), for which you want to review [loads](#).

Carrier

Enter the [carrier](#) for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the [origin](#) or start point for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

Enter the [destination](#) or end point for which you want to review [loads](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter the reference of the [load](#) you want to review.

Enter your selection criteria and then press Enter to display the [Load](#) Details Enquiry Select [Load](#) window.

Load Details Enquiry Select Load Window

To display this window, enter your selection criteria and then press Enter on the [Load](#) Details Enquiry Selection window.

This window is displayed when more than one [load](#) matches the selection criteria. Use it to select the [load](#) required.

Options**Select**

Use this to display the [Load](#) Details Enquiry window for the [load](#).

Load Totals

Use this to display the [Load](#) Totals Enquiry pop-up for the [load](#).

Functions**All Statuses (F15)**

Use this to display [loads](#) with all statuses that match the search criteria.

Select a [load](#) to display the [Load](#) Details Enquiry window.

Load Details Enquiry Window

To display this window, select a [load](#) on the [Load](#) Details Enquiry Select [Load](#) window.

The information displayed on this window includes the [load](#) number, [master load](#) and [drop](#), [consolidation load](#), [ship date](#) and time, [route](#) and [rating](#) information.

Functions**Drops (F14)**

Use this to display the details of all customer [drops](#) for a [load](#).

Orders (F15)

Use this to display the details of all [orders](#) on a [load](#).

Totals (F16)

Use this to display the [Load](#) Totals Enquiry pop-up.

Sub-Loads/Consolidation Loads (F17)

This is only available if the current [load](#) is a [master load](#) or primary [consolidation load](#). Use this to display the sub-[load](#) or [secondary load](#) details.

Returns (F18)

Use this to display a list of returns associated with the selected [load](#). The Enquire on Returns for a [Load](#) window is displayed.

Note: The same enquiry is displayed in the Maintain [Load](#) task.

Consignee (F20)

Use this to display the [carrier](#) details.

Text (F21)

Use this to display the text associated with a [load](#).

Press Enter to return to the [Load](#) Details Enquiry Select [Load](#) window.

Enquire on Drops for a Load Window

To display this window, select [Drops \(F14\)](#) on the [Load](#) Details Enquiry window.

Use this window to view details of all customer [drops](#) on a [load](#).

Options

Delivery Profile Enquiry

Use this to display the Customer [Delivery Profile](#) Enquiry Detail window.

Select [Delivery Profile](#) Enquiry against a [drop](#) to display the [Delivery Profile](#) Enquiry window.

Enquire on Orders for a Load Window

To display this window, select [Orders \(F15\)](#) on the [Load](#) Details Enquiry window.

This window displays details of all [orders](#) for a selected [load](#).

Options

Order Enquiry

Use this to display the Whole [Order](#) Enquiry window.

Refer to the [Order](#) Entry product guide for more information.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry window.

Order Lines

Use this to display the Display [Order](#) Lines window.

Select **Exit (F3)** to leave the enquiry.

Display Order Lines Window

To display this window, select [Order](#) Lines against a [load](#) on the Enquire on [Orders](#) for a [Load](#) window.

This window displays line details for an [order](#).

Options

Order Line Enquiry

Use this to view more details. For more information on the [Order](#) Line Enquiry, see the [Order](#) Entry product guide.

Select **Previous (F12)** to return to the previous window.

Load Totals Enquiry Pop-up

To display this pop-up, select **Totals (F16)** on the [Load](#) Details Enquiry window.

This pop-up displays [capacity](#) and charging details for the selected [load](#).

Functions

Availability/Totals (F15)

Use this to toggle the display between available quantities and total [load](#) quantities.

Select **Previous (F12)** to return to the [Load](#) Details Enquiry window.

Consolidation/Sub-Loads Details Pop-up

To display this pop-up, select [Consolidation Loads/Sub Loads \(F17\)](#) on the [Load](#) Details Enquiry window.

Note: This is only available if you are displaying the details for a master, or primary [consolidation load](#).

This pop-up displays the details of the consolidation, or sub-[loads](#), for the selected [load](#).

Functions

Volume (F14)

Use this to display the [volume](#) of each [load](#).

Weight (F15)

Use this to display the weight of each [load](#).

Containers (F16)

Use this to show the number of [containers](#) for each [load](#).

Select **Previous (F12)** to return to the [Load](#) Details Enquiry window.

Enquire on Returns for a Load Window

To display this window, select **Returns (F18)** on the [Load](#) Details Enquiry window.

Use this window to view the returns for the [load](#) and to make a selection for more detailed enquiry.

Options

Return Enquiry

Use this to display the Return Summary Enquiry window.

Refer to the Customer Returns product guide for more information.

Delivery Profile Enquiry

Use this to display the [Delivery Profile](#) Enquiry window.

Return Lines

Use this to display the Display Return Lines window.

Make a selection to display the appropriate window.

Consignee Details Enquiry Pop-up

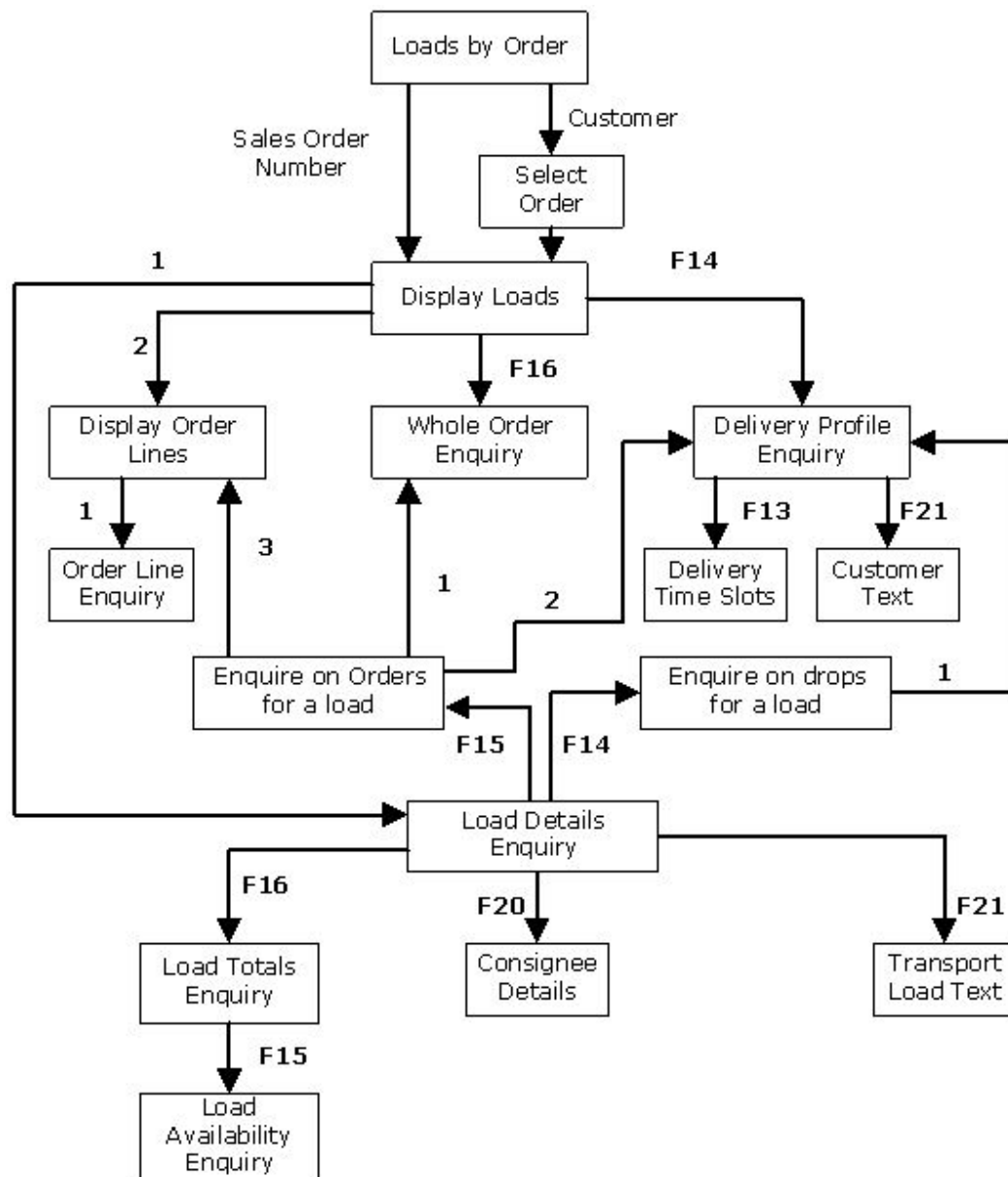
To display this pop-up, select [Consignee](#) (F20) on the [Load](#) Details Enquiry window.

This pop-up shows the address details of the [carrier](#), unless the bill of lading format is 02 (one bill of lading per [drop](#)), in which case this window is blank.

Select **Previous** (F12) to return to the [Load](#) Details Enquiry window.

Loads by Order [3/TPE]

Use this enquiry to display the current position of the sales [order](#) in Transport Planning. You can then easily track the [order's](#) progress. The [Loads](#) by [Order](#) diagram shows the windows accessed from this task.



Transport Loads by Order Number Enquiry Window

To display this window, select the [Loads](#) by [Order](#) task.

Use this window to select the [order](#) on which to enquire or to use a customer and customer [order](#) reference to identify the [order](#).

Fields

Sales Company

Enter the sales company. This defaults to the present company.

You can use the prompt facility to select from the Select Sales Company pop-up.

Sales Order Number

Enter a sales [order](#) number. You cannot enter a [manual requirement order](#) number.

Customer

If you have not entered a sales [order](#) number, you can enter a customer code and delivery sequence.

You can use the prompt facility to select from the Select Customer pop-up.

Customer Order Reference

You can optionally enter a customer [order](#) reference number.

Enter your selection criteria (not a sales [order](#) number) and then press Enter to display the Transport [Loads](#) by [Order](#) Number Enquiry Select [Order](#) window.

If you enter a specific sales [order](#) number, the Transport [Loads](#) by [Order](#) Number Enquiry Display [Loads](#) window is displayed.

Transport Loads by Order Number Enquiry Select Order Window

To display this window, enter your selection criteria (not a sales [order](#) number) and then press Enter on the Transport [Loads](#) by [Order](#) Number Enquiry window.

Use this window to select an [order](#) for which you want to see the transport [load](#) details.

Options**Select**

Use this to select the [order](#).

Functions**Change Level of Detail (F13)**

Use this to toggle between different levels of detail.

Select an [order](#) to display the Transport [Loads](#) by [Order](#) Number Enquiry Display [Loads](#) window.

Transport Loads by Order Number Enquiry Display Loads Window

To display this window, select an [order](#) on the Transport [Loads](#) by [Order](#) Number Enquiry Select [Order](#) window.

Alternatively, enter a sales [order](#) number and then press Enter on the Transport [Loads](#) by [Order](#) Number Enquiry window.

Use this window to view the details of [loads](#).

Options

Load Enquiry

Use this to display the [Load](#) Details Enquiry window.

Order Lines

Use this to display the Display [Order](#) Lines window.

Functions

Delivery Profile Enquiry (F14)

Use this to display the [Delivery Profile](#) Enquiry window.

Sales Order Enquiry (F16)

Use this to display the Whole [Order](#) Enquiry window. For more details, see the [Order](#) Entry product guide.

Select **Exit (F3)** to leave the enquiry.

Loads by Return Enquiry [12/TPE]

Use this enquiry to view [loads](#) for a selected return.

Transport Loads by Return Number Enquiry Selection Window

To display this window, select the [Loads](#) by Return Enquiry task.

Use this window to view information about the [loads](#) for a selected return.

Fields

Sales Company

Enter a valid sales company.

Alternatively, use the prompt facility to select from the Select Sales Company pop-up.

Customer Return Number

Enter a valid return number.

Customer

If you have not entered a return number, you can enter a customer code and delivery sequence. All returns for that customer are displayed and you can select the return you require from the list.

Return Reference

You can optionally enter a return reference along with the customer code and delivery sequence to narrow down the search.

Once a specific return has been selected, [loads](#) for that return are displayed.

Enter your selection criteria (not a specific customer return number) and then press Enter to display the Transport [Loads](#) by Return Number Enquiry - Select Return window.

If you enter a specific customer return number, the Transport [Loads](#) by Return Number Enquiry window is displayed.

Transport Loads by Return Number Enquiry - Select Return Window

To display this window, enter your selection criteria (not a specific customer return number) and then press Enter on the Transport [Loads](#) by Return Number Enquiry Selection window.

Use this window to view returns and select a return for further enquiry.

ptions**Select**

Use this to select a return and view all [loads](#) for that return.

Functions**Change Level of Detail (F13)**

Use this to toggle the level of detail.

Select a return to display the Transport [Loads](#) by Return Number Enquiry window.

Transport Loads by Return Number Enquiry Window

To display this window, select a return on the Transport [Loads](#) by Return Number Enquiry - Select Return window.

Alternatively, enter a customer return number and then press Enter on the Transport [Loads](#) by Return Number Enquiry Selection window.

Use this window to view [loads](#) and select a [load](#) for further enquiry.

Options

Load Enquiry

Use this to display the [Load](#) Details Enquiry window.

Return Lines

Use this to display the Display Return Lines window.

Functions

Delivery Profile Enquiry (F14)

Use this to display the [Delivery Profile](#) Enquiry window for the customer returning the goods.

Return Enquiry (F16)

Use this to display the Return Summary window.

Select Return Lines against a [load](#) to display the Display Return Lines window.

Display Return Lines Window

To display this window, select Return Lines against a [load](#) on the Transport [Loads](#) by Return Number Enquiry window.

Use this window to view return lines and select one for further enquiry.

Note: The same enquiry is displayed in the Maintain [Load](#) task.

Options

Return Line Enquiry

Use this to display the Return Line Status Enquiry window.

Select Return Line Enquiry against a return to display the Return Line Status Enquiry window.

Return Line Status Enquiry Window

To display this window, select Return Line Enquiry against a return on the Display Return Lines window.

Use this window to view details of the return line.

Functions

Invtry Units/Return Units (F11)

Use this to toggle between displaying inventory units and the return units.

Line Text (F21)

Use this to display the Line Text to Print on Return pop-up.

Select **Previous (F12)** to return to the Display Return Lines window.

Loads by Return Enquiry [28/TPM]

Use this enquiry to display the details of customer and stockroom [delivery profiles](#).

Delivery Profile Enquiry Selection Window

To display this window, select the [Delivery Profile](#) Enquiry task.

Use this window to select the sales company and customer or stockroom.

Fields

Sales Company

Enter a company.

Alternatively, use the prompt facility to select from the Select Sales Company pop-up.

Customer

Enter a customer and delivery sequence.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Stockroom

Enter a stockroom.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

Enter or select a sales company, customer and delivery sequence and then press Enter to display the Customer [Delivery Profile](#) Enquiry Detail window.

Alternatively, enter or select a sales company and stockroom and then press Enter to display the Stockroom [Delivery Profile](#) Enquiry Detail window.

Customer Delivery Profile Enquiry Detail Window

To display this window, enter or select a sales company and customer and then press Enter on the [Delivery Profile](#) Enquiry Selection window.

Use this window to display the details of the [delivery profile](#) for the selected sales company and customer combination.

Functions

Delivery Time Slots (F13)

Place the cursor over **1** on any day and select this to view the delivery [time slots](#) for that day.

Text (F21)

Use this to display the internal customer text.

Select **Exit (F3)** to leave the enquiry.

Enquire On Delivery Time Slots Pop-up

To display this pop-up, select Delivery [Time Slots \(F13\)](#) on the Customer [Delivery Profile](#) Enquiry Detail window.

This pop-up displays the times at which you can make deliveries for the selected day.

Select **Previous (F12)** to return to the Customer [Delivery Profile](#) Enquiry Detail window.

Stockroom Delivery Profile Enquiry Detail Window

To display this window, enter or select a sales company and stockroom and then press Enter on the [Delivery Profile](#) Enquiry Selection window.

Use this window to display the details of the [delivery profile](#) for the selected sales company and stockroom combination.

Select **Exit (F3)** to leave the enquiry.

Chapter 5 Reports

Bills of Lading [1/TPR, 2/TPR]

Bills of lading provide formal documents detailing the [load](#) contents in the format specified on the [load](#) header. You normally only produce bills of lading for selected external [carriers](#). Collection requirements planned onto a [load](#) are shown on a bill of lading.

Note: [Load sheets](#) provide a driver's manifest and list all [drops](#) for each [load](#). You can also use [load sheets](#) to marshal goods and despatch notes onto their appropriate transport [loads](#) prior to despatch.

When you print the [master load](#) documentation, Transport Planning prints sub-[load](#) numbers and totals as [drops](#) (as well as any customer [drops](#)) and automatically prints the documentation for unprinted sub-[loads](#).

Transport Planning updates the status of a [load](#) as follows:

- If a [load](#) requires automatic or [manual rating](#), Transport Planning updates the [load](#) status to Awaiting [Rating](#).
- If a [load](#) does not require [rating](#) but requires confirmation of despatch, Transport Planning updates the status to Awaiting Confirmation of Despatch.
- If a [load](#) does not require [rating](#) or confirmation of despatch but contains collection requests, Transport Planning updates the status to Awaiting Confirmation of Returns.
- If a [load](#) does not require [rating](#) or confirmation of despatch and does not contain any collection requests, Transport Planning updates the status to Awaiting [Drop](#) to History. This means that the production of the bill completes the processing of a [load](#).

You can either print bills of lading or re-print already printed sheets.

Note: *Weights and [volumes](#) of returns are not shown on printed documents. Showing the returns on the bill indicates to the driver that something needs to be collected, but the exact amount may change up to the point of confirmation of collection.*

Note: *The current weights and [volumes](#) of returns on a [load](#) can be viewed in enquiries.*

Print Bills of Lading Selection Window

To display this window, select either the Print Bills of Lading task or the Reprint Bills of Lading task.

Note: *The window name reflects the task selected.*

Use this window to select the bills of lading you want to print.

Fields

Ship Date

Enter or select the [ship date](#) for the [loads](#). This field defaults to the current date plus the [planner's](#) time fence days for planning.

Note: *You only have to complete one of the following selection criteria.*

Route

Enter the [route](#) for which you want to print bills of lading.

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter the [carrier](#) for which you want to print bills of lading.

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the start point for which you want to print bills of lading.

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

If you entered the [origin](#), enter the [destination](#) or end point for which you want to print bills of lading.

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter a particular [load](#) reference for which you want to print the bills of lading.

Print/Reprint Load Sheets

Use this checkbox as follows:

Unchecked - Not to print/re-print the [load sheets](#)

Checked - To print/re-print the [load sheets](#)

Load Sheets Sequence

Select one of the following:

Ascending (1) - To print [load sheets](#) in ascending [drop](#) sequence within [route](#)

Descending (2) - To print [load sheets](#) in descending [drop](#) sequence within the [route](#)

Functions

Released Loads (F16)

Use this to display [load](#) headers that conform to the selection criteria, on the Select [Load](#) Detail window.

Note: For the re-print task, this only displays [load](#) headers already printed and the document clearly displays Reprint.

Note: If you have printed a [load](#), but have then re-set it to [Pending](#) for amendment and subsequently released it again, use the print task not the re-print task.

Select **Submit (F8)** to print or re-print the bills of lading.

Load Sheets [3/TPR, 4/TPR]

[Load sheets](#) provide a driver's manifest and list all [drops](#) and collection requests planned for each [load](#). You can also use [load sheets](#) to marshal goods and despatch notes onto their appropriate transport [loads](#) prior to despatch.

Note: Bills of lading are a more formal document detailing the [load](#) contents and are generally produced for selected external [carriers](#) only.

A [load sheet](#) serves three major purposes:

- As a marshalling document for all despatch notes included on a [load sheet](#), particularly where goods have been sourced from more than one stockroom
- As an aid to [loading](#) a [vehicle](#) in the best sequence for [dropping](#)
- As an action and confirmation list for the driver

Collection requests planned onto a [load](#) are shown on a [load sheet](#) immediately after the [drop](#) requirements for a particular [drop](#) sequence. They are provided as an instruction to the driver that he is also expected to pick up goods for a planned return when making a [drop](#).

Weight, [volume](#) or numbers of [containers](#) are not shown for collection requests.

You can print [drops](#) in descending or ascending sequence for the [route](#).

When you print the [master load](#) documentation, Transport Planning prints sub-[load](#) numbers and totals as [drops](#) (as well as any customer [drops](#)) and automatically prints the documentation for unprinted sub-[loads](#).

Where a bill of lading is not required for a [load](#), Transport Planning updates the [load](#) status as follows:

- If a [load](#) requires automatic or [manual rating](#), Transport Planning updates the status to Awaiting [Rating](#).
- If a [load](#) does not require [rating](#) but requires confirmation of despatch, Transport Planning updates the status to Awaiting Confirmation of Despatch.

- If a [load](#) does not require [rating](#) or confirmation of despatch but contains collection requests, Transport Planning updates the status to Awaiting Confirmation of Returns.
- If a [load](#) does not require [rating](#) or confirmation of despatch and does not contain any collection requests, Transport Planning updates the status to Awaiting [Drop](#) to History. This means that the production of the [load sheet](#) completes the processing of a [load](#).

You can print [load sheets](#) or re-print sheets already printed.

Note: *Weights and [volumes](#) of returns are not shown on printed documents. Showing the returns on the [load sheet](#) indicates to the driver that something needs to be collected, but the exact amount may change up to the point of confirmation of collection.*

Note: *The current weights and [volumes](#) of returns on a [load](#) may be viewed in enquiries.*

Containers

If extended [container](#) summaries are required for a particular [transport centre](#), a [container](#) summary is printed on each [load sheet](#) showing a summary of the [containers](#) used when shipping the products on a [load](#).

The [container](#) summary shows the following details for each [container](#) item:

- [Container](#) item code
- [Container](#) item description
- [Container](#) item quantity

Note: *Only those [containers](#) with the Show in [Container](#) Summary flag set on the appropriate item/[container](#) profile definition are listed on each [load sheet](#).*

Print Load Sheets Window

To display this window, select either the Print [Load Sheets](#) task or the Reprint [Load Sheets](#) task.

Note: *The window name reflects the task selected.*

Use this window to select the [load sheets](#) you want to print.

Fields

Ship Date

Enter or select the [ship date](#) for the [loads](#). This field defaults to the current date plus the [planner's](#) time fence days for planning.

Note: *You only need to enter one of the following selection criteria.*

Route

Enter the [route](#) for which you want to print [load sheets](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Carrier

Enter the [carrier](#) for which you want to print [load sheets](#).

Alternatively, use the prompt facility to select from the Select [Carrier](#) pop-up.

Origin

Enter the start point for which you want to print [load sheets](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Destination

If you entered the [origin](#), enter the [destination](#) or end point for which you want to print [load sheets](#).

Alternatively, use the prompt facility to select from the Select Transport [Node](#) pop-up.

Load Number

Enter a particular [load](#) reference for which you want to print the [load sheets](#).

Load Sheets Sequence

Select one of the following:

Ascending (1) - To print [load sheets](#) in ascending [drop](#) sequence within the [route](#)

Descending (2) - To print [load sheets](#) in descending [drop](#) sequence within the [route](#)

Functions

Released Loads (F16)

Use this to display [load](#) headers that conform to the selection criteria, on the Select [Load](#) Detail window.

Note: For the re-print task, this only displays [load](#) headers already printed and the document clearly displays Reprint.

Note: If you have printed a [load](#), but have then re-set it to [Pending](#) for amendment and subsequently released it again, select the print task, not the re-print task.

Select **Submit (F8)** to print or re-print the [load sheets](#).

Delivery Documentation Print [5/TPR]

Use this task to select the type of documentation you wish to print and specify the selection criteria for printing.

Note: The Document Processing application must be installed and the stockrooms attached to the [transport centre](#) must be associated with a stockroom site to produce any delivery documentation using this task.

Delivery Documentation Not Available Window

This window will be displayed if you select the Request Delivery Documentation task where the Document Processing application has not been installed or the stockrooms attached to a [transport centre](#) are not associated with a stockroom site.

This window signifies that delivery documentation cannot be produced for the current [transport centre](#)

Select **Exit (F3)** to leave the task.

Request Delivery Documentation Selection Header Window

To display this window, select the Delivery Documentation Print task.

Use this window to describe the documentation you want to print, and to specify printing criteria by ranges or lists of items.

You can select documentation to be printed by:

- Stockroom site
- Document source - for example, sales despatch
- Document type - despatch documentation only, or combined despatch and invoice documentation, or both.

Note: The stockrooms attached to a [transport centre](#) could be attached to multiple stockroom sites in the same or different sales companies.

Fields

All Sites/Company & Site

If you leave the All Sites field **unchecked**, you can enter the company and site code for the specific stockroom site for which you want to print the documentation.

Note: If all of the stockrooms attached to a [transport centre](#) are attached to a single stockroom site, the stockroom site is defaulted to the appropriate value and entry is not allowed in any of these fields.

If you **check** the All Sites field, you can enter a sales company code but leave the site code blank to print documentation for all stockroom sites attached to the current [transport centre](#) in the specified sales company.

If you **check** the All Sites field, you can leave both the sales company and site code blank to print documentation for all stockroom sites attached to the current [transport centre](#) in all sales companies.

Note: The sites associated with a [transport centre](#) may be in multiple sales companies.

You can use the prompt facility on the Company section of this field to select from the Company Selection pop-up.

You can use the prompt facility on the Site section of this field to select from the Stockroom Site Selection pop-up.

Despatch Reference

You can optionally allocate a unique reference to the document. If you leave this field blank, the system will allocate the next available reference number.

To enter your own reference number and override automatic allocation, select **Override Despatch Reference (F13)**. This changes Despatch Reference from a display field to an input field, so that you can enter your chosen reference number.

Note: *You can only override the Despatch Reference field on this window if you are printing documentation for one, and only one, stockroom site.*

Document Date

This field defaults to the current system date, but you can amend it.

Print Sequence

Enter the sequence in which you want to print delivery documentation.

Alternatively, use the prompt facility to select from the PRSQ Print Sequence pop-up.

Drop Sequence

Select one of the following:

Ascending (1)

Descending (2)

Document Source

Enter the source of the delivery notes to be printed.

Alternatively, use the prompt facility to select from the DCSC Document Source Type pop-up.

Note: *You must enter 0 or 1 if you also request any of the following transport attributes as selection criteria:*

- Range or list of transport [carrier](#) codes
- Range or list of [route](#) codes
- Range or list of [load](#) numbers

Note: *Transport details are only written to the document details related to sales despatches.*

Note: *Therefore, if you enter any of the above transport attributes as selection criteria, only sales despatch delivery documentation will be extracted and printed by the submitted print job.*

Document Type

Enter the type of document to be printed.

Alternatively, use the prompt facility to select from the DCTY Document Type pop-up.

Note: Care must be taken to ensure that all pick notes requiring consolidation onto a single delivery note meet the selection criteria entered. This can best be achieved by selecting to print by customer, despatch date or [load](#).

Print Invoice Summary

Use the checkbox as follows:

Unchecked - Not to print the invoice summary

Checked - To print the invoice summary

Selection Criteria

You must select at least one of the following to specify the documentation you wish to print:

- Document reference
- Customer or supplier
- Despatch date
- Stockroom
- [Carrier](#)
- [Route](#)
- [Load](#)

You make your selection by selecting one of the following:

Range (1) - To specify a range for the selected value

List (2) - To specify a list for the selected value

Functions

Override Despatch Reference (F13)

Use this to override the despatch reference number that is automatically allocated by the program, so that you can enter a specific number in the Despatch Reference field.

Note: You can only override the Despatch Reference field on this window if you have selected a specific stockroom site for which to produce delivery documentation.

When you have made your selections, select Continue (F8) to display the Request Delivery Documentation Range Selection Detail window.

Request Delivery Documentation Range Selection Detail Window

To display this window, select Range against any of the selection criteria and then select **Continue (F8)** on the Request Delivery Documentation Selection Header window.

Use this window to enter ranges of values for the delivery documentation you wish to print. The ranges of values that can be entered here are based on the selections you make on the Delivery Note Print Selection Header window.

Fields

Site

These fields display the relevant site code and name.

Site Company

These fields display the company code and name.

Despatch Reference

You can optionally allocate a unique reference to the document. If this field is left blank, the system will allocate the next available reference number.

To enter your own reference number and override automatic allocation, select **Override Despatch Reference (F13)**. This changes Despatch Reference from a display field to an input field, so that you can enter your chosen reference number.

***Note:** You can only override the Despatch Reference field on this window if you are printing documentation for multiple stockroom sites.*

Range Selection

From/To

Enter the range of delivery documents that you wish to print.

You can use the prompt facility on these fields to select from the relevant pop-up.

Carry Forward Selections

Use this checkbox as follows:

Unchecked - If selection criteria entered for the current site will not be used for the next site

Checked - If selection criteria entered for the current site will be used as the default selection criteria for the next stockroom site

***Note:** This field is only relevant if delivery documentation has been requested for multiple stockroom sites.*

Functions

Copy Selections from Site (F14)

Use this to display the Copy Selection Criteria from Site pop-up and retrieve selection criteria previously entered against another site associated with the current [transport centre](#).

When you have made your selections, select **Submit (F8)** to print the documentation.

Copy Selection Criteria from Site Pop-up

To display this pop-up, select **Copy Selections from Site (F14)** from the Request Delivery Documentation Range Selection Detail window.

Use this pop-up to select a site from which selection criteria previously entered is to be copied to the current site.

Options

Select

Use this to select the stockroom site from which you want to copy previously entered selection criteria to this site.

Select a site to copy the selection criteria entered against the selected site to the current site.

Request Delivery Documentation List Selection Detail Window

To display this window, select List against any of the selection criteria and then select Continue (F8) on the Request Delivery Documentation Selection Header window.

Use this window to enter lists of values for the delivery documentation you wish to print. The lists of values that can be entered here are based on the selections you make on the Request Delivery Documentation Selection Header window.

Fields

Site

These fields display the relevant site code and name.

Site Company

These fields display the company code and name.

Despatch Reference

You can optionally allocate a unique reference number to the document. If this field is left blank, the system will allocate the next available reference number.

To enter your own reference number and override automatic allocation, select **Override Despatch Reference (F13)**. This changes Despatch Reference from a display field to an input field, so that you can enter your chosen reference number.

Note: *You can only override the Despatch Reference field on this window if you are printing documentation for multiple stockroom sites.*

Use this checkbox as follows:

Unchecked - If selection criteria entered for the current site will not be used for the next site

Checked - If selection criteria entered for the current site will be used as the default selection criteria for the next stockroom site

Note: *This field is only relevant if delivery documentation has been requested for multiple stockroom sites.*

List Selection

Enter lists of delivery documents that you wish to print.

You can use the prompt facility on these fields to select from the relevant pop-up.

Functions

Copy Selections from Site (F14)

Use this to display the Copy Selection Criteria from Site pop-up and retrieve selection criteria previously entered against another site associated with the current [transport centre](#).

When you have made your selections, select **Submit (F8)** to print the documentation.

Delivery Documentation Reprint [6/TPR]

Use this task to re-print delivery documentation that you have already specified and printed using the Delivery Documentation Print task.

The Document Processing application must be installed and the stockrooms attached to the [transport centre](#) must be associated with a stockroom site to produce any delivery documentation using this task.

This task is the same as the Reprint Selection task [2/DYP] in Document Processing. See the Processing chapter of the Document Processing product guide for further information.

Delivery Documentation Not Available Window

This window will be displayed if you select the Reprint Delivery Documentation task where the Document Processing application has not been installed or the stockrooms attached to a [transport centre](#) are not associated with a stockroom site.

This window signifies that delivery documentation cannot be produced for the current [transport centre](#).

Select **Exit (F3)** to leave the task.

Reprint Delivery Documentation Selection Header Window

To display this window, select the Delivery Documentation Reprint task.

Use this window to specify re-printing criteria for delivery documentation that you have already printed via the Request Delivery Documentation task.

You can select documentation to be re-printed by:

- Stockroom site
- Document source - for example, sales despatch
- Document type - despatch documentation only, or combined despatch and invoice documentation, or both

Note: The stockrooms attached to a [transport centre](#) may be attached to multiple stockroom sites in the same or different sales companies.

Fields

All Sites/Sales Company/Stockroom Site

If you leave the All Sites field **unchecked**, you can specify the company and site code for the specific stockroom site for which you want to re-print the documentation.

Note: If all of the stockrooms attached to a [transport centre](#) are attached to a single stockroom site, the stockroom site is defaulted to the appropriate value and entry is not allowed in any of these fields.

If you **check** the All Sites field, you can enter a sales company code and leave the site code blank to re-print documentation for all stockroom sites attached to the current [transport centre](#) in the specified sales company.

If you **check** the All Sites field, you can leave both the sales company and site code blank to re-print documentation for all stockroom sites attached to the current [transport centre](#) in all sales companies.

Note: The sites associated with a [transport centre](#) may be in multiple sales companies.

You can use the prompt facility on the Company section of this field to select from the Company Selection pop-up.

You can use the prompt facility on the Site section of this field to select from the Stockroom Site Selection pop-up.

Print Sequence

Enter the sequence in which you want to re-print delivery documentation.

Alternatively, use the prompt facility to select from the PRSQ Print Sequence pop-up.

Drop Sequence

Select one of the following:

Ascending (1)

Descending (2)

Document Source

Enter the source of the delivery notes to be re-printed.

Alternatively, use the prompt facility to select from the DCSC Document Source Type pop-up.

Note: You must enter 0 or 1 if you also request any of the following transport attributes as selection criteria:

- Range or list of transport [carrier](#) codes
- Range or list of [route](#) codes
- Range or list of [load](#) numbers

Note: *Transport details are only written to the document details related to sales despatches.*

Note: *Therefore, if you enter any of the above transport attributes as selection criteria, only sales despatch delivery documentation will be extracted and re-printed by the submitted print job.*

Document Type

Enter the type of document to be re-printed.

Alternatively, use the prompt facility to select from the DCTY Document Type pop-up.

Note: *Care must be taken to ensure that all pick notes requiring consolidation onto a single delivery note meet the selection criteria entered. This can best be achieved by selecting to re-print by customer, despatch date or [load](#).*

Selection Criteria

You must select at least one of the following to specify the documentation you wish to re-print:

- Document reference
- Customer or supplier
- Despatch date
- Stockroom
- [Carrier](#)
- [Load](#)
- [Route](#)

You make your selection by selecting one of the following:

Range (1) - To specify a range for the selected value

List (2) - To specify a list for the selected value

When you have made your selections, select **Continue (F8)** to display the Reprint Delivery Documentation Range Selection Detail window.

Reprint Delivery Documentation Range Selection Detail Window

To display this window, select Range against any of the selection criteria and then select **Continue (F8)** on the Reprint Delivery Documentation Selection Header window.

Use this window to enter ranges of values for the delivery documentation you wish to re-print. The ranges of values that can be entered here are based on the selections you make on the Reprint Delivery Documentation Selection Header window.

Fields

Site

These fields display the relevant site code and name.

Site Company

These fields display the company code and name.

Range Selection**From/To**

Enter the range of delivery documents that you wish to print.

Carry Forward Selections

Use this checkbox as follows:

Unchecked - If selection criteria entered for the current site will not be used for the next site

Checked - If selection criteria entered for the current site will be used as the default selection criteria for the next stockroom site

Note: *This field is only relevant if delivery documentation has been requested for multiple stockroom sites.*

Functions**Copy Selections from Site (F14)**

Use this to display the Copy Selection Criteria from Site pop-up and retrieve selection criteria previously entered against another site associated with the current [transport centre](#).

When you have made your selections, select **Submit (F8)** to print the documentation.

Copy Selection Criteria from Site Pop-up

To display this pop-up, select **Copy Selections from Site (F14)** on the Re-print Delivery Documentation Range Selection Detail window.

Use this pop-up to select a site from which selection criteria previously entered is to be copied to the current site.

Options**Select**

Use this to select the stockroom site from which you want to copy previously entered selection criteria to this site.

Select a site to copy the selection criteria entered against the selected site to the current site.

Request Delivery Documentation List Selection Detail Window

To display this window, select List against any of the selection criteria and then select **Continue (F8)** on the Reprint Delivery Documentation Selection Header window.

Use this window to enter lists of values for the delivery documentation you wish to re-print. The lists of values that can be entered here are based on the selections you make on the Reprint Delivery Documentation Selection Header window.

Fields

Site

These fields display the relevant site code and name.

Site Company

These fields display the company code and name.

Carry Forward Selections

Use this checkbox as follows:

Unchecked - If selection criteria entered for the current site will not be used for the next site

Checked - If selection criteria entered for the current site will be used as the default selection criteria for the next stockroom site

Note: *This field is only relevant if delivery documentation has been requested for multiple stockroom sites.*

List Selection

Enter lists of delivery documents that you wish to print.

You can use the prompt facility on these fields to select from the relevant pop-up.

Functions

Copy Selections from Site (F14)

Use this to display the Copy Selection Criteria from Site pop-up and retrieve selection criteria previously entered against another site associated with the current [transport centre](#).

When you have made your selections, select **Submit (F8)** to re-print the documentation.

Document Pricing [7/TPR]

You may have [originally](#) produced some sales [orders](#) with [order](#) lines that were unpriced because no prices were available at that time. Use this task to re-price despatch notes and combined despatch notes and invoices, created in Sales [Order](#) Processing.

There are no selection criteria for this task. Select Confirm **Submit (F8)** to submit the batch job.

Outstanding Orders/Returns Report [13/TPR]

The Outstanding [Orders](#) report provides you with details of all [order](#) requirements not yet assigned to [loads](#), with [capacity](#) totals per [route](#) and date. The report is sequenced by [route/drop](#) within the required [ship date](#) range and provides details of [capacity](#) requirements.

Use this report in conjunction with the Build [Loads](#) task.

Outstanding Orders/Returns Report Window

To display this window, select the Outstanding [Orders](#)/Returns Report task.

Use this window to enter the range of [ship dates](#) and [route](#) selections for the Outstanding [Orders](#) report.

Fields

Ship Date From/To

Enter or select the range of [ship dates](#) for which you want to review [orders](#). The To date defaults to the current date plus the [planner's](#) time fence days for planning and is matched against the [order](#) line despatch date.

If you do not enter a To date, all outstanding [orders](#) on or after the From date are selected.

Route From/To

Enter the [route](#) range for which to review [orders](#).

You can use the prompt facility on these fields to select from the Select pop-up.

To select details for all [routes](#), leave both the From and To fields blank.

If you enter a From [route](#) and leave the To [route](#) blank, all details are selected with [route](#) codes matching, or greater than, the From [route](#).

Select **Submit (F8)** to submit the report.

Load Status Report [14/TPR]

The [Load](#) Status report provides summary information for the total [capacity](#) requirements of outstanding [orders](#), together with a view of current [loads](#). The report is sequenced by [route](#) or [drop](#) within the required [ship date](#) range and provides a direct comparison between outstanding requirements and current [loads](#) applicable to the selected requirements.

Use this report, in conjunction with the Outstanding [Orders](#) report and the Build [Loads](#) task, to assess and action over or under [capacity](#) commitments to [loads](#), prior to assigning further requirements.

For example, for all [routes](#) where there is enough commitment for a [load](#), and not enough to overload it, the [planner](#) can build these [loads](#) immediately. Otherwise, the [planner](#) uses the Outstanding [Orders](#) report for under and over committed [routes](#) to determine which [orders](#) to re-assign during the Build [Loads](#) task.

Load Status Report Window

To display this window, select the [Load](#) Status Report task.

Use this window to select the [ship date](#) and [route](#) for the [Load](#) Status report.

Fields

Ship Date From/To

Enter or select the range of [ship dates](#) for which you want to review [loads](#).

If you do not enter a To date, all outstanding [orders](#) on or after the From date are selected.

The To date defaults to the current date plus the [planner's](#) time fence days for planning and is matched against the [load ship date](#).

Route From/To

Enter the [route](#) range for which to review [orders](#).

You can use the prompt facility on these fields to select from the Select [Route](#) pop-up.

To select details for all [routes](#), leave both the From and To fields blank.

If you enter a From [route](#) and leave the To [route](#) blank, all details are selected with [route](#) codes matching, or greater than, the From [route](#).

Select **Submit (F8)** to submit the report.

Load Details Report [15/TPR]

The [Load](#) Details report displays details of all [order](#) requirements currently assigned to [loads](#). The report is sequenced by [route/drop](#) within a specified [ship date](#) range and provides details of [capacity](#) requirements.

Use this report in conjunction with the [Load](#) Status report and the Maintain [Load](#) task to assess and action over and under [capacity](#) commitments to [loads](#).

Load Details Report Window

To display this window, select the [Load](#) Details Report task.

Use this window to select the [ship date](#) and [route](#) for the [Load](#) Details report.

Fields

Ship Date From/To

Enter or select the range of [ship dates](#) for which to display [orders](#).

If you do not enter a To date, all outstanding [orders](#) on or after the From date are selected.

The To date defaults to the current date plus the [planner's](#) time fence days for planning and is matched against the [load ship date](#).

Route From/To

Enter the [route](#) range for which to review [orders](#).

You can use the prompt facility on these fields to select from the Select [Route](#) pop-up.

To select details for all [routes](#), leave both the From and To fields blank.

If you enter a From [route](#) and leave the To [route](#) blank, all details are selected with [route](#) codes matching, or greater than, the From [route](#).

Select **Submit (F8)** to submit the report.

POD Audit Report by Load Number [16/TPR]

This report will collect details from various files and present them in such a way that you can view retrospectively what actually happened in the interactive or batch POD confirmation process.

Since this could be is a very large document, this is designed to be an “on request” task.

POD Audit Report Selection Window

To display this window, select the POD Audit Report by [Load](#) Number task.

Use this window to select the data for printing.

Fields

Load Number

Enter a valid [load](#) number

Alternatively, use the prompt facility to select from the [Loads](#) with [Orders](#) Despatched using POD pop-up.

Select **Submit (F8)** to submit the report for processing.

Item Transport Exception Report [17/TPR]

This report lists items (for the current [transport centre](#)) which do not have an appropriate item transport profile.

The following are exceptions:

Condition	Exception
Items with no container profile	Items with no item transport details defined
Items with a container profile	Items with no item transport details or with item transport details but no standard outer defined
Items with a customer-specific container profile	Items with no customer-specific item transport details or with customer-specific item transport details but no standard outer defined

All items are checked which have an item/stockroom profile for a stockroom defined to the user's [transport centre](#) and exceptions are listed by sales company and item.

Note: Users wishing to view those items that do have transport profiles should write their own query over the item/pack type file (TPP48).

Select Confirm **Submit (F8)** to submit the report for processing.

Chapter 6 Utilities

Transport Planning Company Profile [1/TPU]

Use this task to enter and maintain the reference data that controls the processing of transport [order](#) requirements for a particular company.

When you create a Transport Planning company, you must have already set up the company in Inventory Management.

Maintain Company Profile Selection Window

To display this window, select the Transport Planning Company Profile task.

Use this window to select the Transport Planning company you want to maintain or create.

Fields

Company Code

To create a new company, enter a code using two alphanumeric characters.

Note: *You must have already set up the company in Inventory Management.*

To maintain an existing transport company, enter the required company.

Alternatively, use the prompt facility to select from the Transport Company Selection pop-up.

Press Enter to display the Maintain Company Profile Address window.

Maintain Company Profile Address Window

To display this window, enter or select a company and then press Enter on the Maintain Company Profile Selection window.

Use this window to enter the address details for the selected company.

Fields**Company Name**

Enter the name for the transport company.

Address

Enter the address for the transport company.

Post Code

Enter the postcode for the transport company.

Transport Container Decimals

Select the number of significant decimal places, (0, 1 or 2) for transport [containers](#). Transport Planning uses this setting to calculate and display [container](#) capacities.

Weight Decimals

Select the number of significant decimal places, (0, 1, 2 or 3) for transport weights. Transport Planning uses this setting to calculate and display weight capacities.

Volume Decimals

Select the number of significant decimal places, (0, 1, 2 or 3) for transport [volumes](#). Transport Planning uses this setting to calculate and display [volume](#) capacities.

Load Numbers per Centre

Use this checkbox as follows:

Unchecked - To generate [load](#) references with a single alphanumeric prefix and incrementing number range that appears throughout the system

[Load](#) references are unique within the transport company.

Checked - To generate [load](#) references with an alphanumeric prefix and incrementing numeric range for the [transport centre](#)

[Load](#) references are unique within the [transport centre](#) only.

Load Number Prefix

Enter the [load](#) reference prefix to precede all automatically generated [load](#) references.

Load Number Range

Enter the range for the numeric portion of the transport [load](#) number reference.

Transport Planning increments all automatically generated [load](#) numbers from the lower value. If the [load](#) numbers reach the upper limit, Transport Planning re-assigns transport [load](#) references from the lower limit.

Press Enter to display the Maintain Company Profile Details window.

Maintain Company Profile Details Window

To display this window, press Enter on the Maintain Company Profile Address window.

Use this window to enter the default sales and accounting details.

Within the Transport Planning Build [Loads](#) task, the [container](#) summary for each transport requirement and a specified [load](#) can be based on [container](#) type. Up to seven columns of [container](#) quantities can be displayed, each containing the details for a different [container](#) type.

The [Container](#) Summary Presentation Details define the default presentation requirements for the [container](#) summary within a transport company.

Fields

Order Planning Level

Select one of the following:

[Order](#) (1) - To use the stockroom associated with the [order](#) header for the retrieval of transport planning information

Lines (2) - To use the stockroom associated with each [order](#) line for the retrieval of transport planning information

In line level planning, you can process a particular sales [order](#) via a number of different [transport centres](#).

Initial Creation of Transport Requirements

Enter the point at which you initially create transport requirements. You define the point of creation in the Inventory Descriptions file under major type TPIC. The default points are:

- 1 - Sales [order](#)/return creation
- 2 - Sales [order](#) allocation/return authorisation
- 3 - Pick note creation/return print
- 6 - Confirm despatch of pick note/return print

You can use the prompt facility to select from the TPIC Creation of Transport Req. pop-up.

Note: *Transport Planning does not currently support options 4 and 5.*

Default Sales Company

Enter the Sales or Inventory company associated with any Inventory Descriptions file entries.

Alternatively, use the prompt facility to select from the Select Company pop-up.

General Ledger Company

Enter the General Ledger company associated with the transport company. If you enter a company code, Transport Planning assumes General Ledger is attached. You must define all tax codes and General Ledger account codes to the ledger.

Default Tax Code

Enter the normal tax [rate](#) charged by [carriers](#) for transporting goods.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

If General Ledger is attached, you must define this code in the General Ledger. If General Ledger is not attached, you must define the tax code in the Inventory Descriptions file under major type tax.

Transport Requirement Lead Time

Enter the number of days forward from the current date up to which new sales [order](#) and return lines are transferred into Transport Planning (based on their due date).

Note: A change in lead time will not take effect until you [stop](#) and re-start the Transport Planning background subsystems.

Accounts Payable Posting Method

This determines what invoices are transferred to the Accounts Payable invoice log when you authorise a [payment](#) for multiple [loads](#) on a single [carrier](#) invoice.

Select one of the following:

Single (1) - To transfer a single invoice

Multiple (2) - To transfer an invoice for each [load](#) on the [carrier's](#) invoice

Detailed Container Summary in Build Load

Display of a detailed [Container](#) Type [Container](#) Summary is optional.

Use this checkbox as follows:

Unchecked - To generate [container](#) summaries based on existing item transport details

Checked - To construct a more detailed [container](#)-based [container](#) summary for each transport requirement

The value here becomes the default value at [Transport Centre](#) level.

Select **Update (F8)** to save the data and leave the task.

The [Container](#) Summary Presentation Details pop-up is displayed automatically if the Detailed [Container](#) Summary in Build [Load](#) field is **checked**.

Container Summary Presentation Details Pop-Up

To display this pop-up, check the Detailed [Container](#) Summary in Build [Load](#) field on the Maintain Company Profile Details window.

A list of [container](#) types (as defined in the Inventory Descriptions file under major type CTP) is displayed.

For each [container](#) type, you identify the column into which the number of [containers](#) of that type required for shipment is accumulated when constructing the Detailed [Container](#) Summary information during the Build [Loads](#) task.

The headings to appear for each column within the Build [Loads](#) task can also be defined.

Fields

Column

Enter any numeric value in the range 1 to 7.

Functions

Column Headings (F14)

Use this to define the appropriate headings to appear in the Build [Loads](#) task for each column of the [container](#) summary. The [Container](#) Summary Column Headings pop-up is displayed.

Select **Update (F8)** to save the information and return to the Maintain Company Profile Details window.

Container Summary Column Headings Pop-Up

To display this pop-up, select **Column Headings (F14)** on the [Container](#) Summary Presentation Details pop-up.

Use this window to define the column headings to appear within the Build [Loads](#) task for the extended [container](#) summary.

Enter an appropriate description and heading for each of the seven available columns in the [container](#) summary.

Fields

Description

Enter a description, using up to thirty characters, for each column.

Heading

Enter a heading, using up to five characters, for each column.

Select **Update (F8)** to accept the entered values and return to the [Container](#) Summary Presentation Details pop-up.

Planner Profile [2/TPU]

Use this task to enter the authorisation level of a specified [planner](#) for transport [order](#) requirements.

For security reasons, you must set up a profile for every [planner](#) who uses Transport Planning. You set up the profile for the [planner's](#) user ID.

You can define the [planner's](#) default [transport centre](#). [Planners](#) normally operate within a default [transport centre](#) but they can change to any centre to which they are authorised.

You can authorise each user ID to one or more [transport centres](#).

Maintain Transport Planners Selection Window

To display this window, select the [Planner](#) Profile task.

Use this window to select the transport company and user profile you want to maintain.

Fields

Company Code

Enter an existing transport company.

Alternatively, use the prompt facility to select from the Transport Company Selection pop-up.

User Profile

Enter the required user ID.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

Enter or select a company code and user profile and then press Enter to display the Maintain Transport [Planners](#) Detail window.

Maintain Transport Planners Detail Window

To display this window, enter or select a company and user ID and then press Enter on the Maintain Transport [Planners](#) Selection window.

Use this window to enter the default [transport centre](#) and levels of authority for the selected [planner](#).

Fields

Default Centre

Enter the [transport centre](#) to be the default for this [planner](#). This is the [transport centre](#) the [planner](#) normally uses to plan, marshal and despatch [loads](#).

Alternatively, use the prompt facility to select from the Select [Transport Centre](#) pop-up.

Note: You can authorise the [planner](#) to [transport centres](#) by selecting [Transport Centres](#) (F13).

Planning Time Fence Days

Enter the number of days to use as the default planning time fence. This determines the planned [ship date](#) the [planner](#) uses when reviewing [order](#) requirements and [load](#) details. The planned [ship date](#) is the current date plus this figure.

Release Load

Use this checkbox as follows:

Unchecked - If the [planner](#) cannot release [loads](#)

Checked - If the [planner](#) can release [loads](#)

Override Capacity Errors

Use this checkbox as follows:

Unchecked - If the [planner](#) cannot override [capacity](#) errors when assigning transport requirements

Checked - If the [planner](#) can override [capacity](#) errors

Authorise Payments

Use this checkbox as follows:

Unchecked - If the [planner](#) cannot match [carrier payments](#) against calculated charges for [loads](#)

Checked - If the [planner](#) can match [carrier payments](#)

Authorise Adjustments

Use this checkbox as follows:

Unchecked - If the [planner](#) cannot authorise adjustments to [carrier payments](#)

Checked - If the [planner](#) can authorise adjustments

Functions**Transport Centres (F13)**

Use this to authorise the [planner](#) to [transport centres](#).

Select **Update (F8)** to save the information and to return to the Maintain Transport [Planners](#) Selection window.

Authorise Planners to Transport Centres Window

To display this window, select [Transport Centres \(F13\)](#) on the Maintain Transport [Planners](#) Detail window.

Use this window to select the [transport centres](#) that the [planner](#) can use.

Note: Select **All Centres (F15)** to authorise the [planner](#) to all centres.

Options**Select**

Use this to authorise the [planner](#) to the selected [transport centre](#).

Delete

Use this to remove the [planner's](#) authorisation from the selected [transport centre](#).

Functions**All Centres (F15)**

Use this to authorise the [planner](#) to all [transport centres](#) defined to the transport company.

Select **Previous (F12)** to return to the Maintain Transport [Planners](#) Detail window.

Start/Stop Application Background Jobs [20/L1S]

Transport Planning creates transport requirements via a set of background jobs that run in a Transport Planning subsystem.

After starting the subsystem, request activation of the following tasks:

- Requirements monitor
- Creation of requirements
- Amendment of requirements (including [order](#) cancellations)
- Creation of pick requirements from sales [order](#) requirements
- Creation of sales [order](#) requirements from pick requirements (via short despatch)

Further further information, see the Generic Function product guide.

Select the Start/[Stop](#) Application Background Jobs task to start or end the background jobs.

Create Requirements (TP Company) [15/TPU]

Use this batch job to transfer [order](#) requirements into Transport Planning when the [order](#) line due date falls on or inside the time fence horizon, that is, the current date plus the transport requirement lead time, as defined on the company profile.

In addition to [order](#) requirements, this process transfers customer return requirements into Transport Planning when the expected return date falls on or inside the time fence horizon, that is, the current date plus the transport requirement lead time, specified on the company profile.

Use this to avoid passing [order](#) and return lines scheduled for delivery or collection in the future, which do not yet require planning of transportation. You only need to select this task when you have set the transport requirement lead time to a value other than the default.

This process considers all [order](#) and collection requirements for all [transport centres](#) within the transport company being used. This should be scheduled, within Machine Manager, to run automatically, preferably on a daily overnight run

Select Confirm **Submit (F8)** to submit the batch job.

Update Load History [20/TPU]

Use this task to delete cancelled [loads](#) and to delete and [drop](#) to history [completed loads](#).

Note: To run this job you must have exclusive use of the company.

Depending on how you configured the [transport centre](#), [loads](#) may be complete after any of the following process steps.

- Printing documentation - [load sheets](#)/bills of lading
- Confirm despatch
- Confirmation of collection of returns
- Authorisation of [payment](#) details

This task deletes and creates history details for the following information:

- [Load](#) headers
- [Load drops](#)
- [Drop orders](#)
- [Order](#) line details
- [Load](#) charge details
- [Load](#) text

[Route](#) period history details are updated for the [carrier/vehicle type](#) combination for both completed and cancelled [loads](#).

This task only processes [loads](#) if you have completed all associated AFI postings, that is, you have posted all charge/[payment](#) details (if applicable) for [completed loads](#), and cancelled the postings of all charge and/or [payment](#) details (if applicable) for cancelled [loads](#).

Update Load History Selection Window

To display this window, select the Update [Load](#) History task.

Use this window to select the company and [transport centre](#) you want to update.

Fields

Company

Enter the transport company.

Alternatively, use the prompt facility to select from the Transport Company Selection pop-up.

Transport Centre

Enter the [transport centre](#).

Alternatively, use the prompt facility to select from the Select [Transport Centre](#) pop-up.

Select **Update (F8)** to delete all cancelled [loads](#) and to delete and [drop](#) to history all [completed loads](#).

Load Purge [21/TPU]

Use this task to remove [load](#) history details from the system on a week stamp basis. You can delete [payment](#) and [route](#) period history details.

The following history details are deleted:

- [Load](#) headers
- [Load drops](#)
- [Drop orders](#)
- [Order](#) line details
- [Load](#) charge/[payment](#) details (optional)
- [Route](#) period history details (optional)

Purge Load History Details Window

To display this window, select the [Load](#) Purge task.

Use this window to select the details for which you want to purge the historical details.

Fields

Company

Enter the transport company.

Alternatively, use the prompt facility to select from the Transport Company Selection pop-up.

Transport Centre

Enter the [transport centre](#).

Alternatively, use the prompt facility to select from the Select [Transport Centre](#) pop-up.

Week Number From

Enter the week number from which to remove historical data.

Week Number To

Enter the week number up to which to remove historic data.

Purge Charge History

Use this checkbox as follows:

Unchecked - To retain charge data on the system

Checked - To remove historic charge data from the system

Purge Route/Period Details

Use this checkbox as follows:

Unchecked - To retain the historic [route](#)/period data

Checked - To remove the historic [route](#)/period data

Select **Update (F8)** to start the batch job to purge the selected data.

Remove Audit Transaction Data [22/TPU]

All master and transaction file data is audited according to standards. Record images are written to separate audit files for all record additions, changes and deletions. These records are:

- After image for additions
- Before and after image for changes
- Before image for deletions

Although all files are audited, those files directly associated with the processing of [loads](#) normally increase in size relatively quickly.

Use this task to clear the audit files associated with the following [load](#) data:

- [Load](#) headers
- [Load drops](#)
- [Drop orders](#)
- [Order](#) line details
- [Load](#) charge/[payment](#) details

This deletes, by default, all of the audit data except for that created in the last two weeks.

Note: Before running this task, you must print the report of the required audit information.

Remove Audit Transaction Data Window

To display this window, select the Remove Audit Transaction Data task.

Use this window to enter the date before which you want to remove audit details.

Fields

Audit Removal Date

Enter or select the audit removal date in DDMMYYYY format.

Select **Submit (F8)** to submit the batch job to remove all records created before the specified date and re-organise the audit files.

En-masse Route Transfer [23/TPU]

Use this task to change a [route](#) globally across multiple [loads](#). You can replace all references of a particular [route](#) with a revised [route](#) or you can revise a [drop](#) on a [route](#) to a new [drop](#) on the same [route](#) or a different [route](#).

You can change [load](#) history details as well as the live data.

This task changes the following:

- [Delivery profiles](#)
- [Carrier routes](#)
- [Load](#) headers
- [Load drops](#)
- [Drop orders](#)
- [Load](#) charges
- [Route](#) history (optional)
- [Load](#) history (optional)

Caution: This task updates all occurrences of the route or drop and can therefore take a long time to run.

Note: You must [stop](#) the Transport Planning background processes while you run this task.

Global Route Change Window

To display this window, select the En-masse [Route](#) Transfer task.

Use this window to select the [route](#) or [drop](#) you want to change.

Caution: This task updates all occurrences of the route or drop and can therefore take a long time to run.

Fields

Company

Enter the transport company.

Alternatively, use the prompt facility to select from the Transport Company Selection pop-up.

Transport Centre

Enter the [transport centre](#) for which the [route](#) transfer is to take place.

Alternatively, use the prompt facility to select from the Select [Transport Centre](#) pop-up.

Original Route

Enter the existing [route](#) code, all occurrences of which you want to replace with the revised [route](#).

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Original Drop

Enter the existing [drop](#), all occurrences of which you want to replace with the revised [drop](#).

Revised Route

Enter the revised [route](#) code. You must have defined this [route](#) to Transport Planning.

Alternatively, use the prompt facility to select from the Select [Route](#) pop-up.

Revised Drop

If you entered an [original drop](#), enter the revised [drop](#).

Update Load History

Use this checkbox as follows:

Unchecked - If you do not want to change [load](#) history details

Checked - If you want to change the [load](#) history files

Select **Update (F8)** to transfer the [load](#) details.

Copy Item Transport Details [24/TPU]

Use this task to copy item transport profiles across a number of different [transport centres](#).

You can copy the details for a particular sales company processed by the centre, or for all sales companies processed by the centre.

You can restrict the items copied by range and you can copy them into a number of centres by range. All sales companies processed for the copy must already be processed by the targeted [transport centres](#); that is, sales company/stockroom definitions must be pre-defined to the target centres.

Note: If you target a range of [transport centres](#), only those centres to which you are authorised are copied.

Copy Item Transport Details Window

To display this window, select the Copy Item Transport Details task.

Use this window to select the transport details you want to copy.

Fields

Company Code

Enter the transport company code from which you want to copy the item details.

Alternatively, use the prompt facility to select from the Transport Company Selection pop-up.

Transport Centre

Enter the [transport centre](#) from which you want to copy the item details.

Alternatively, use the prompt facility to select from the Select [Transport Centre](#) pop-up.

Sales Company

If you want to copy items for a single sales company, enter a sales company attached to the entered [transport centre](#).

Alternatively, use the prompt facility to select from the Select Sales Company pop-up.

Item (From)

Enter the item from which you want to copy the details. You must have defined the item to Transport Planning within the entered [transport centre](#), and a sales company, if entered.

Item (To)

Enter the item code to which you want to copy details. You must have defined the item to Transport Planning within the entered [transport centre](#), and a sales company, if entered.

Transport Centre (From)

Enter the [transport centre](#) from which you want to copy item details. You must have defined the [transport centre](#) to the sales company.

Transport Centre (To)

Enter the [transport centre](#) to which you want to copy details. You must have defined the [transport centre](#) to the sales company.

If you leave this field blank, the [Transport Centre](#) (From) is the only [transport centre](#) into which data is copied.

Select **Submit (F8)** to start the copy process.

Serious Error Report [30/TPU]

Use this task to report and delete serious errors logged to the error file.

A number of error conditions can occur during the planning processing cycle, and these may require manual intervention to process complete, associated [loads](#).

These error conditions are trapped to ensure that any data problems found by the background transport requirements and amendment processes are noted. The error codes are as follows:

01 - Sales [order](#) not found

The sales [order](#) can no longer be found in Sales [Order](#) Processing when you create or amend the transport requirements.

02 - Pick note header not found

The pick note can no longer be found in Sales [Order](#) Processing when you create or amend transport requirements for the pick note.

03 - Item record not found

The inventory item master record cannot be found when you calculate transport requirements for the item, that is, weights (gross, net and tare) and [volumes](#).

04 - Item/stockroom record not found

The inventory item/stockroom profile record cannot be found when you calculate transport requirements for the item, that is, weights (gross, net and tare) and [volumes](#).

05 - [Route](#) specified not found

The default [route](#) defined to a [delivery profile](#) cannot be found when you calculate transport requirements for an [order](#).

06 - Time out for requirements update

This error condition arises if a time out occurs when you are retrieving a locked sales [order](#) record. It is important that you finish creating [order](#) requirements before processing amendment requests. Under these conditions, a sales [order](#) will be locked for the whole of the requirements creation before processing an amendment request. If the amendment request finds the sales [order](#) locked, it waits and re-tries the [order](#) for five minutes before issuing a serious error and bypassing the [order](#) amendment request.

07 - Details changed after AFI posting

If a [load](#) is set back to [Pending](#) after [rating/payment](#) information has already been posted by AFI, a serious error is issued. This could arise if you have released and [rated](#) a [load](#) and then set it back to [Pending](#) state, because of changes in the transport requirements.

08 - Details changed after manual override

Transport Planing automatically maintains planned and actual capacities (weights, [volumes](#) and numbers of [containers](#)) until a manual override takes place that maintains actual capacities in isolation, (via Build [Loads](#) or Maintain [Load order](#) amendment). If a manual override has taken place and a request is made to amend associated [order](#) transport requirements, only planned capacities are amended and a serious error is issued.

09 - Global [route](#) change warning

This is issued as part of a global [route](#) change request for each [carrier/route](#) combination affected.

10 - Possible [capacity](#) problems

During the conversion of sales [order](#) transport requirements to pick note transport requirements (and the reverse process, for example, for pick note cancellations), weight and/or [volume capacity](#) errors can arise for [vehicle types](#) associated with assigned [loads](#). If this occurs, a serious error is issued.

11 - Item transport profile not found

The transport item profile record cannot be found when you calculate the transport requirements for the item, that is, weights (gross, net and tare) and [volumes](#).

Note: This report details all errors logged for all defined Transport Planning companies.

Serious Errors Report Submission Window

To display this window, select the Serious Error Report task.

Use this window to enter the selection criteria for the Serious Error report.

Fields

Print Report

Use this checkbox as follows:

Unchecked - Not to print the serious error report

Checked - To print the serious error report

Clear Serious Error File

Use this checkbox as follows:

Unchecked - Not to clear the serious error file of data after printing the serious error report

Checked - To clear the serious error file after printing the serious error report

Note: This operates across all transport companies. We strongly advise you to print the report before you clear the serious error file.

Select **Submit (F8)** to start the batch job.

Transport Planning Trial Extract [40/TPU]

Use this task to run test extracts of data from Transport Planning and create a General Ledger journal. Note that no actual updating of data takes place, either within Transport Planning or General Ledger. This is simply a simulation of the effect of creating the specified journals for the nominated company. You can generate three reports:

- General Ledger Postings - a list of the postings generated
- Exceptions Report - a list of any balancing postings automatically created for an unbalanced journal
- Error Report - a list of any error conditions encountered

Transport Planning Trial Extract and Update Window

To display this window, select the Transport Planning Trial Extract task.

- Use this window to select the source company and type of extract you want to process.

Fields

Source Company

Enter the source company whose data you want to use for this trial extraction.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Work With Loads Not Yet Processed

Use this checkbox as follows:

Unchecked - To specify a range of transaction numbers on which you want to base the trial

Checked - To use data that has not been extracted in live operation mode by AFI

Work With Loads From/To

These fields are only relevant if the previous field was left **unchecked**. Use these fields to specify the range of transaction dates in the source application you want to use in this trial. If you want to use only the [loads](#) that occurred on a single day, specify the same date in the From and To fields.

Transactions within the source application that can be used for this trial are displayed in a pop up.

Type of Journal Definition to Use

Select one of the following:

Under Test (1) - To use journal definitions that are specified as being under test.

Live (2) - To use journal definitions that are specified as being live

Both (3) - To use both test and live journal definitions

Consolidate Postings

Use this checkbox as follows:

Unchecked - For no consolidation of postings to take place

Checked - For postings to be consolidated

Press Enter to validate your entries and then select **Proceed (F8)**.

Transport Planning Extract/Update [41/TPU]

This task extracts the Transport Planning transactions you specified within AFI, and AFI processes these to create General Ledger journals

AFI Transport Charges Extract - Live Pop-up

To display this pop-up, select the Transport Planning Extract/Update task.

Use this pop-up to select the source company you want to process.

Fields

Company (Untitled)

Use this to specify the company code of the company for which you want Transport Planning transactions extracted.

You can use the prompt facility to select from the Select Company pop-up.

Transactions are extracted according to the selection criteria set up on your journal condition.

Select **Proceed (F8)** to continue with the extraction.

Install Transport/AFI Link [42/TPU]

Before you can use Transport Planning with the Advanced Financial Integrator to update your General Ledger, you must create the link between AFI and Transport Planning.

Use this task to do this.

Once you have created this link, the Transport Planning module will appear in the AFI module selection pop-up, and you can define how you want AFI to extract information from Transport Planning.

You cannot automatically extract information from Transport Planning and post it to the General Ledger without using the AFI.

Possible uses for AFI in Transport Planning are:

- Manual and [automatic rating](#) creates charge details for [loads](#) that AFI can then extract for accrual accounting of transport costs.
- [Payment](#) authorisation updates charge details with [payment](#) information and transfers the invoice details to Accounts Payable. You can post any variances between [rating](#) and [payment](#) values to the General Ledger via AFI.
- If you cancel a [load](#) that was [rated](#) but not extracted by the AFI, it creates a [rating](#) posting and a subsequent [rating](#) cancellation posting when you extract using AFI. Where you have extracted the [rating](#) posting by AFI, it only creates a [rating](#) cancellation posting. For [loads](#) you have not [rated](#), no AFI extraction takes place.

Note: Before you use AFI, you must set the AFI link status to active using the Maintain Application task in AFI.

Select Confirm **Submit (F8)** to submit the batch job.

Appendix A Glossary

Agent Contact

The person with whom the transport is booked

Area

This is a geographical division of transport planning responsibilities. These normally have very definite boundaries; for example, motorways, rivers, mountains, county/state lines and are normally determined by the carrier.

Area Minimum

The lowest charge, made by the carrier, for delivering any load, or part load, into this area

Assembled Order

An order that has been confirmed as picked and despatched in Sales Order Processing and Invoicing or Warehousing

Authorise Payment

A carrier invoice is matched to the relevant load, with the payment details being transferred to Accounts Payable.

Automatic Rating

The rating of loads, by the application, based on their corresponding rate codes

Bill of Lading (BoL)

A formal document, containing full particulars of goods shipped or for shipment, which forms a contract with the carrier

Bill Format

A system code which defines the layout of the BoL details

Break Bulk

The splitting of a master load into subloads for local delivery

Capacity

The maximum amount a particular vehicle type can contain, in terms of the load gross weight and/or volume

Capacity Type

The unit in which capacity is measured, such as gross weight, volume or a total number of containers

Carrier

This is an organisation employed to transport goods. This may be an internal fleet or an external haulier or parcel carrier.

Carrier Rates

This is a set of charges levied for the transportation of goods. Each set is identified by a rate code, which is assigned to a load for automatic rating purposes and is effectively a contract with the carrier.

Carrier Type

This is a user-defined classification of carriers. It may be used to determine whether it is an internal company fleet or an external organisation.

Charge Structure

This is a table of charges which may be used as part of the definition of a carrier rate. It represents a sliding scale of rates based on gross weight, volume or number of containers.

Commodity Code

A standard code representing the type of product being transported

Completed Load

A load awaiting drop to history; that is, requiring no further action other than to archive

Confirm Delivery Time

This shows that this customer operates a booking in system for transport and that you must confirm a suitable delivery time.

Consignee

The person, agent or carrier to whom the goods to be transported are handed over

Consolidated Rating

The consolidation of loads together such that the rating is based on the total weight (or volume or number of containers) of all loads

Consolidation Load

A load included within a primary load to produce a rate based on the total capacity of all the loads

Container

An object used for holding goods during transportation; for example, carton, box, pallet, barrel, drum

Conversion Factor

A fixed value normally used to convert weight, or volume, between imperial and metric units when rating or printing a load

Cyclic Route

A route where the destination is the same as the origin

Default Centre

This is the transport centre for which the planner has primary responsibility. The planner is automatically assigned into this transport centre.

Delivery Profile

A delivery address, defined to Transport Planning, with additional parameters used as defaults for planning deliveries to this customer

Destination

This is the predetermined end of a route, which is defined to the application as a node. For cyclic routes, the destination is the same as the origin.

Driver Manifest

This is a document that lists all the loads on a vehicle, and is a working document to take on the journey. This is often a copy of the Load Sheet.

Drop

This is a point on the route where part of the load is delivered. A sequence number is normally used to define drop points, to make sure the driver visits them in a cost effective manner. A drop is uniquely identified by a combination of the sequence number and a customer delivery point. There may be multiple customer delivery points associated with each drop.

Drop Charge

A carrier charge rate per drop

Drop Charge (Minimum)

The least amount a carrier will charge for all drops on a load

Drop Charge (Maximum)

The most a carrier will charge for all drops on a load

Exclusive Load

A load containing only orders for one particular customer delivery point

Free Drops

The number of drops for which the drop charge is *not* applied

Goods Value

The total sales value of the goods contained on the load, held for insurance purposes

Gross Weight

Total weight of goods when stored in their containers

Line Haulage

This is the delivery of a consolidated load to a depot where it is split into multiple loads for onward delivery by local carriers. (See also Master Load)

Load

A group of drops to be made on an assigned route, by a nominated carrier, on a particular date

Load Charge (Minimum)

The minimum amount a carrier charges for transporting an individual load

Load Grand Total

The sum of total charges plus drop charges plus penalties plus surcharges for an individual load

Load Sheet

This is a document used for marshalling and loading despatches onto the vehicle. It is often used, particularly for internal fleets, as a driver manifest which provides a working document to take on the journey.

Manual Payment

This is a payment to be made to a carrier having matched his invoice to a load but not posted to Accounts Payable. This is used where the carrier has already been paid manually via Accounts Payable without matching to a load (in exceptional circumstances).

Manual Rating

This is the rating of loads, by the user, based on rates entered specifically for each load. It is normally applied where a carrier is infrequently used.

Manual Requirement

These are sales orders that require delivery, but have not been entered onto the computer system. These are typically where the order is being delivered on behalf of another company.

Master Load

This is a load which represents the movement of goods from a central manufacturing or distribution site to local depots where bulk loads are broken down into sub-loads for local delivery, normally by different local carriers.

Net Weight

The net weight is the actual weight of goods and is equal to the Gross weight less the tare weight.

Node

This is a geographical location where one or more routes start or end. Normally a depot or warehouse used by the carrier, and often a transport centre in its own right from where onward transport is planned.

Order

This may represent a customer order, distribution order (for depot replenishment) or a despatch note. It is assigned to a drop when added to a load.

Origin

This is the predetermined start of a route, which is defined to the application as a node, and is normally where a transport centre is situated. For cyclic routes, the origin is the same as the destination.

Outstanding Load

A load not yet completed, and still awaiting further action within the system

Outstanding Order/Outstanding Requirement

An order not yet added to a load

P and L Override

A specific General Ledger profit and loss account to which the transport costs of the load are to be posted

Payables Account

The account to which details of carrier invoices, and their subsequent payments, are posted

Payment

The amount to be paid to the carrier for transportation of goods, after first matching the carrier's invoice to the relevant load and posting to Accounts Payable

Payment Method

How the carrier is to be paid, e.g. prepaid, cash on delivery paid by the customer

Penalty

An additional charge applied when the gross weight of the load is less than the carrier's specified minimum weight

May also be applied for [volume](#) or number of [containers](#), rather than weight

Pending

The status of a load whilst it is still available for the addition of orders, that is, not yet released

Planner

A person who has responsibility for planning transport

Planner Time Fence

This is the number of calendar days ahead that a planner is normally planning transport. Zero represents today, 1 tomorrow and so on.

Primary Load

This is the load to which multiple secondary loads are consolidated to produce a rate based on total capacity of the primary, plus all secondary loads.

Radial Routes

Routes sharing a common origin each with a different destination

Rate

This is a price per unit to be charged by the carrier for transporting goods. It is based on a contract or agreement with the carrier.

Rate Code

See Carrier Rates.

Rating

Calculation of the expected carrier charge for a load, based on the rating method and rate code assigned to it

Rating Method

A system code representing how the carrier rates are used to calculate the charges for a load (in automatic rating)

Ready for Loading

See Assembled Order.

Released Load

A load which is available for shipment, with the next process being the printing of transport documentation

Route

This is a regular journey travelled from the transport centre, represented by a code which is associated with delivery profiles and assigned to loads.

Seal Number

This is used where security tags are physically attached to the load, with each one identified by a reference number and/or colour.

Secondary Load

See Primary Load. Primary and secondary loads are normally delivered on a single vehicle, possibly in separate compartments, and so are rated together (with the rated value apportioned over the loads).

Ship Date

Despatch date for the load from the origin

Ship Time

Despatch time for the load from the origin

Skeleton Load

A standard load which is used regularly as the basis of a new load, by copying across the defaults and instructions added to it

Stop

Alternative term for a drop, often used in the US and Canada

Sub Load

Local delivery loads which are associated with a master load but which are planned independently of the master load

Surcharge

Unforeseen increases to carrier rates; for example, increases in fuel, vehicle insurance, expressed as an additional value or a percentage increase applied to total charge

Tare Weight

The weight of the wrapping or container in which the goods are transported

Time Slot

This is a range of times when the customer accepts deliveries. It is normally used only for customers with restrictions.

Total Charge

This is the charge calculated for a load, based on multiplying the rate by the gross weight (or volume or number of containers).

Transhipment

This is the transfer of goods, via a load, from one stockroom to another within the company.

Transport Centre

This is a stockroom/warehouse/depot/distribution centre from where goods are physically transported. (This may be a group of System21 stockrooms).

Vehicle

A registration number or unique code identifying the vehicle carrying the load

Vehicle Type

Represents a class of vehicle in terms of its key attributes; for example, temperature control, dimensions, loading method

Volume

The cubage occupied by the goods when packed in their respective containers

Waybill

This is an alternative term for bill of lading often used in the US and Canada. (See also Bill of Lading.)