Jack Richards HMS v1.0

Crib Sheet

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1 Before you Begin

In order to use the software correctly, you should ensure that you are correctly setup before you attempt to use the system. If at anytime you require assistance with any of these steps, please call the helpdesk on 0845 644 3720 and somebody will be able to help you.

1.1 Configuring Internet Explorer

In order to use the system correctly you need to be running Internet Explorer 6 and the system must be a Trusted Site. To add the site to the list of Trusted Sites, perform the following steps:

- Follow this link to http://hms.jackrichards.co.uk.
- Click the "Tools" menu and select the "Internet Options…" option.
- When the new window appears, select the "Security" tab.
- Click the "Trusted sites" icon (the green circle with the white tick).
- Click the "Sites…" button.
- In the new window type hms.jackrichards.co.uk, make sure that the checkbox "Require server verification (https:) for all sites in this zone" checkbox is **not checked**.
- Click the "OK" button.
- Click the "Custom Level…" button at the base of the page.
- Find the item "Initialize and script ActiveX controls not marked as safe" and change the selected item from "Prompt" to "Enable".
- Click the "OK" button.
- Click the "OK" button.

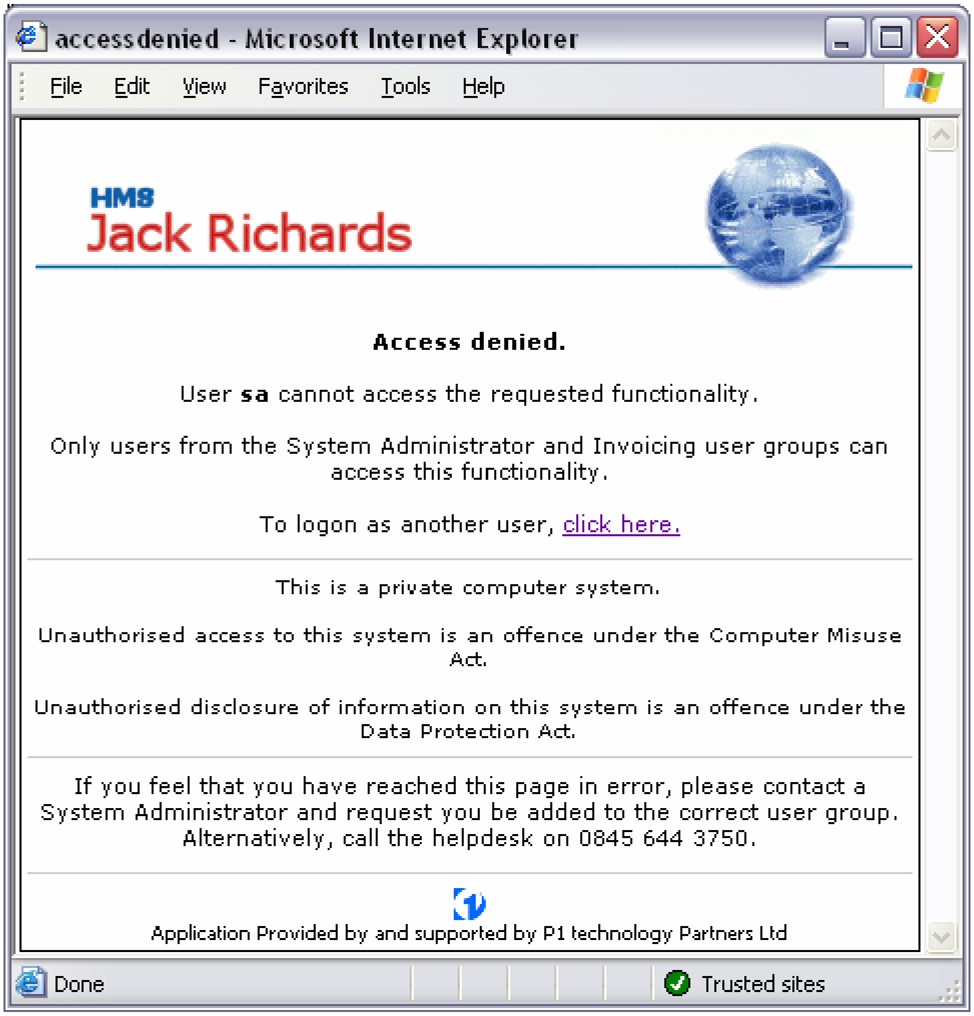
1.2 Extra Steps if you are going to be Scanning PCVs or PODs

In addition to performing the steps dictated in 1.1 you will also need a member of support to execute a script to allow the scanned images to be sent from your PC to the server.

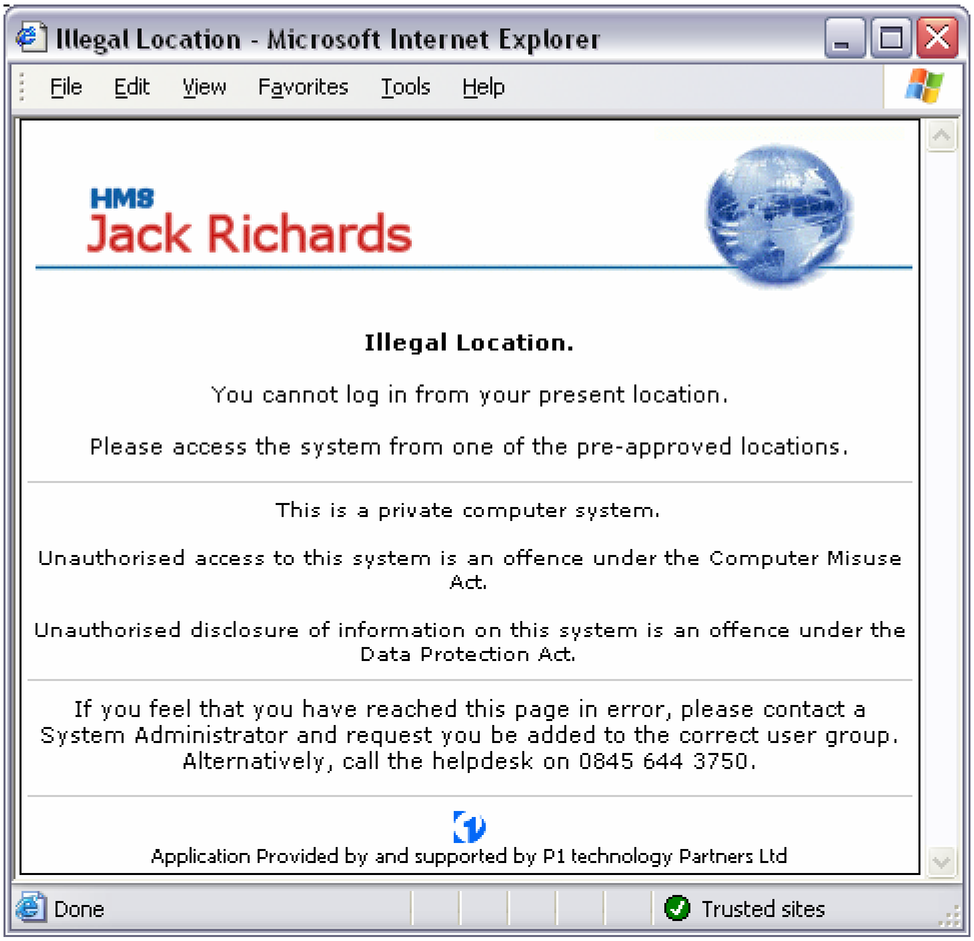
You will not be able to make this adjustment yourself, so you will need to call the helpdesk on 0845 644 3720 for assistance. We are looking into automating this so this step is not required.

1.3 Security Aspects of HMS

When you are supplied with a username and password to access HMS you will also have been configured to access only certain parts of the system, if at anytime you feel that you have been denied access to a part of the system you will need to get in contact with your user administrator and get them to add the relevant permissions to your user details. If you are denied access to a specific page you will receive a message much like this one.



The other major security aspect you should bare in mind is that only certain logins are allowed to login from outside of Jack Richards' premesis, again if you feel that you should be entitled to log in from other locations, you need to take this up with your manager. If you are not allowed to log in from other locations you will receive the following message.



2 Dealing with Jobs on the System

In order to have jobs in the system to plan, and eventually get paid for the jobs must first be added into the system. The jobs will go through a process within the system that is designed to take that job from a starting state of Booked, through to "Invoiced".

2.1 Job States

There are nine job states that jobs can move between during the course of their operation:

- Booked
  When a job is first entered onto the system, it is said to be in a booked state. This state reflects that the job has not been planned enough to do the next leg in the system. Obviously when the job is first entered into the system, no legs have been planned so the whole job is booked.
- Planned
  When the next leg in the job has enough resource attached to it to physically be completed, the job is said to be "Planned". This is synonymous with "Pencilled In", it indicates that you would like the stated resources to do this job, but have not yet agreed with the driver that they should perform the planned duties.
- In Progress
  Once you have communicated the next leg in the job to the appropriate driver the job is said to be in progress. This means that you are going to use those resources to complete that part of the job.
- Completed
  Once a call-in has been recorded for each instruction on the job, and for normal jobs, each docket has been delivered the job is said to be Completed. Once a collection has been called in you can not alter that collection, so if you need to alter the job to record actual docket information and eventual destinations, do so before the call-in has been recorded.
- Booking In Incomplete
  A job will normally reach this stage once it has been priced, but not marked as booking in complete. This stage is more of a intermediary step towards being "Ready to Invoice".
- Booking In Complete
  Once a user has attached all the available PODs to a job they will mark the job as "Booking In Complete". If the job has already been priced, it will advance straight to "Ready to Invoice".
- Ready to Invoice
  When a job is marked as being ready to invoice it can be attached to an invoice. This is covered in section 7.
- Invoiced
  When a job has been attached to an invoice it is marked as "Invoiced", again this is covered in section 7.
- Cancelled
  When a job's cancellation request has been approved the job is set to this state.

2.2 Job Types

There are four types of jobs that can be dealt with by HMS:

- Normal – these jobs are the normal, collect from here, deliver to here type of jobs.
- Stock Movement – these are a special type of normal job, in that they will not be displayed on the client's call-in sheet and are intended for jobs where the goods to not move outside the client's organisation, e.g. warehouse clearance jobs.
- Pallet Return – these jobs are used to collect pallets from a point and then dehire those pallets against one or more client pallet balances.
- Goods Return – these jobs are used to collect previously returned/refused goods from a point and return them to a client at a specified point.

In the vast majority of cases you will be dealing with Normal jobs, so we'll cover those first.

2.3 Normal Jobs

These jobs are the normal, collect from here, deliver to here type of jobs.

2.3.1 Adding a Normal Job

To add a normal job you need to make use of the job wizard. The wizard is a tool that walks you through the process of adding a normal or stock movement job using a number of steps.

To access the job wizard, choose the "Normal" option from the "Add New Job" option from the "Job" menu, this will cause the job wizard to open in a new window. The wizard has the following steps, but you will not always visit all of these:

- Client Selection
  During this step you will be asked to select the organisation you are performing the work for. This step using a filtering dropdown so if you start typing the name of the organisation the list shown will shrink until you find the organisation you are looking for.

  This list only shows organisation that have been configured as a client, if you can not find the correct organisation you can either promote a client customer (if the organisation has previously only selected deliveries), or create a new client. You will be prompted to do one of these if you attempt to go to the next step without selecting the client from the list.

- Job Charging
  During this step you will be asked to supply the charge type to apply to the job, the rate to charge for the job, and indicate whether or not the job is a stock movement job. For a normal job, leave the checkbox unchecked, for a stock movement job, check the box. If you do not know the rate for the job at this point, leave it at 0, it can be altered later, either by updating the job, or during the pricing process.

  The options you have for the job charge type are as follows, each client can be configured to have a default rate type:

  - PerPallet – if you wish to apply a charge for each pallet involved on the job, select this option, then supply the per pallet rate in the rate box.

  - Job – if the job has a flat rate, select this option, then supply the rate in the rate box.
  - FreeOfCharge – if the job is to be free of charge, but you don't wish it to appear on an invoice, select this option.
  - FreeOfChargeInvoicing – if the job is to be free of charge, but you do wish it to appear on an invoice, select this option.

- Job References
  During this step you will be asked to supply the "load number" for the job, along with any other references that should be captured for this particular client. The "load number" text can be altered within the References panel in the add/update organisation page to reflect the actual name given to this number, by default this is set to "Load Number"

  The idea of the Load Number is the number that ties the whole job together. For example, for a Wisbech Roadways job, this number appears as Load on the Fax, but for Aggregate Industries jobs it appears as Order.

  The other reference that you need to supply are configured as on the references tab on the add/update organisation page.

  You must supply a load number, but if you genuinely don't have one, if you press Next then press Next again, a load number will be automatically generated for you. This load number will be unique for the client, and you can change at a later date.

- Collection Details – Add Collection Point
  During this step you must supply the collection location. If you click on the arrow on the right hand side of the point name you will see all the choices for this client that have been set as collection points, and can select the appropriate point from the list, doing this will cause the town to be filled in for you.

  If you can not find the point you wish to use it is possible that it has not been set to accept collections or does not exist. To set the point to accept collections, edit the point and check the collections depot. If it does not exist specify the closest town name and then give the point a name. When you click next you will be taken to the "Adding a New Point" step, if you have selected a known point you will be asked to enter docket information.

- Adding a New Point
  During this step you need to specify the address for the new point you have started to create. You do this by using the find address wizard (see 10.1). When you have selected the address it will be displayed on this page, after which you can press Next to proceed to entering the docket information.

- Collection Details – Enter Docket Information

During this step you will be specifying the date and time for the collection, any notes that apply to the collection and the details of each docket being collected.

A “docket” is defined as grouped collection of goods and each docket is represented by a distinct POD. For example, if a job has two deliveries it must have at least two dockets to collect. The wording “Docket Number”, is derived from the terminology used by Wisbech Roadways, but is configurable on a per client basis in the same manner as the Load Number.

A collection date must be supplied, but the time can be AnyTime – in which case the collection will need to be planned to occur on or before 23:59 of the collection date to satisfy the collection. Any notes entered into the notes section will be displayed on the traffic sheet in order to aid the planning process. These details are the same for the whole collection and can not be different on a per-docket basis.

When entering a docket you need to supply a docket number that is unique across all collections on this particular job, it is not possible to have the system automatically generate one for you, but it is possible to alter the numbers later. Along with the docket number you can enter the following information, number of cases, number of pallets and weight. Any of this information can be altered later.

If you need to add more dockets to a collection, simply check the “Add another docket to this collection” checkbox and press Next. A list of the docket numbers you have already entered will be displayed in the top right hand corner of the page to help you remember which details have already been supplied. If you have made a mistake, for example, you have checked the box to add another docket when no additional docket exists, simply press the Remove button; this will return you to the previous docket entered.

- Job Details
  The job details page can be split into five sections; charge information, client references, collections, deliveries, control area.

  The charge information section displays the type of charge being applied, the rate being applied, the type of the job, and whether or not the job is a stock movement job. You can alter any of these items by clicking the “Alter” button to the right of this section.

  The client references section contains the load number and the configured references associated with the client that owns this job. You can alter any of these items by clicking the “Alter” button to the right of this section.

  The collections section contains information about the collections on the job, in their running order. The information displayed can be summarised as; where the collection is taking place, when the collection is booked to occur, the total number of cases, pallets and weight being collected, any notes associated with the collection, and a list detailing the dockets being collected. Next to each collection header you can see four buttons. The first (an arrow pointing downwards) will switch this collection with the following collection, the second (an arrow pointing upwards) will switch this collection with the previous collection; these two buttons can be used to alter the running order of the job. The third button (containing three dots) can be used to edit the collection, and the last button can be used to delete the collection. You can add a collection by clicking the "Add Collection" button.

The deliveries section contains the same information as the collections section, but for deliveries and the same functionality is available. You can add a delivery by clicking the "Add Delivery" button.

The control area section shows which control area this job will be assigned to when created, this can be changed up to the point you create the job. The auto-detect option will look at the traffic area for the first collection, and base it's selection on that information.

At the base of the page, there are two buttons "Finish" and "Cancel". It is important to remember, if you do not click the "Finish" button the job will not be created. Clicking the "Cancel" button will close the wizard, without saving the job. Once you have created the job you can click the "Add another Job" button to start again, or the "Close" button to close the wizard.

- Delivery Details – Specify Delivery Customer
  During this step you will be asked to select the organisation you are delivering the goods to. This step using a filtering dropdown so if you start typing the name of the organisation the list shown will shrink until you find the organisation you are looking for.

  This list shows organisation that have been configured as a clients or client customers, if you can not find the correct organisation you can create a new organisation b checking the checkbox. You will be prompted to do one of these if you attempt to go to the next step without selecting the organisation from the list.

- Delivery Details – Add Delivery Point
  During this step you must supply the delivery location. If you click on the arrow on the right hand side of the point name you will see all the choices for this delivery organisation that have been set as delivery points, and you can select the appropriate point from the list, doing this will cause the town to be filled in for you.

  If you can not find the point you wish to use it is possible that it has not been set to accept deliveries or does not exist. To set the point to accept deliveries, edit the point and check the deliveries depot. When you click next you will be taken to the "Adding a New Point" step, if you have selected a known point you will be asked to enter docket information.

- Delivery Details – Enter Docket Information

During this step you will be specifying which of the dockets you specified during the collection details steps you are delivering to this point.

A delivery date must be supplied, but the time can be AnyTime – in which case the delivery will need to planned to occur on or before 23:59 of the delivery date to satisfy the delivery. Any notes entered into the notes section will be displayed on the traffic sheet in order to aid the planning process. These details are the same for the whole delivery and can not be different on a per-docket basis.

To attach a docket to a delivery, simply select the docket number from the dropdown list of dockets that have not yet been attached to a delivery. Selecting a docket from the list causes it's information to be displayed in the number of cases, number of pallets, and weight boxes – but these can not be changed here.

If you need to add more dockets to a delivery, simply check the "Add another docket to this delivery" checkbox and press Next. A list of the docket numbers you have already attached to this delivery. If you have made a mistake, for example, you have checked the box to add another docket when no extra dockets should be delivered to this point, simply press the Remove button; this will return you to the previous docket selected.

2.3.2 Updating a Normal Job

In order to edit a normal job you must first either click the "edit job" link in the Traffic Sheet, job details page, or job sheet. This will open the job wizard on the details page with the correct job information loaded.

Just as when you were creating the job, you can alter the job charge information and references by clicking the "Alter" button in the relevant sections.

There are four things to remember when updating a normal job:

- If the button you want to press is greyed out and doesn't respond to mouse clicks, it means that the job state is preventing you from altering that aspect of the job. For example, you can not alter a collection or delivery or it's dockets once the call-in has been recorded for that collection or delivery. So make sure if you need to alter the job that you do that before recording the call-in, or you can remove the call-in, make the change and then create the call-in again.
- If you have started altering a part of the job, you can undo the changes you've made by clicking the "Back" button until you get back to the job details page, but as soon as you click the "Next" button and the message "processing your changes" appears those changes are being written to the job and must be undone by hand.
- If you change running orders, the instructions will move around the legs, but the resources assigned will be kept on the same leg, i.e. they will deliver different jobs – although editing the job will cause communications to be removed as these communications may now be invalid.

- You can not alter the point a collection or delivery occurs at once you that collection or delivery is shown on the details page, you must delete the whole instruction and recreate it with a new point.

Aside from those key points you can edit the job in the same manner as you edited the collection and delivery information whilst creating the job, it will just take a little longer to process.

2.3.3 Best Practices when Working with Jobs

If you are unsure about how best to deal with a particular job, make use of these points to help you proceed.

2.3.3.1 I don't know where I am delivering to!

There are occasions when the client only provides a destination town until you actually make the collection. In order to get the job on the system, add the collection details as well as you can, and in the notes section list the delivery town name (e.g. Ipswich, Norwich x2, Kings Lynn). This allows you to get the job on the system so somebody can plan it, but also lets them now the destinations that will need planning in the future.

When you do know exactly where you are going you will need to update the collection details to include the relevant dockets, and also add the appropriate delivery information.

2.3.3.2 I need to bulk lots of jobs onto a single trailer!

For some clients, notably Aggregate Industries, you will want to put many jobs onto a single trailer – which normally you can't do. In this case you need to basically turn many jobs into one job and this is done when you create the job. By way of an example we will consider this for Aggregate Industries.

When you are creating a job to do this, you will want to auto-generate the load number. Each "job" that Aggregate Industries has supplied should be thought of as a single docket. In other words we are going to record the Order number as the docket number, and then create a delivery point for each real delivery and deliver (typically) a single docket to each delivery.

Example:
We have the following 5 jobs for Aggregate Industries that we are going to bulk together to form a single job.

Customer	Order	Weight	Village/Suburb Town/City,	W/H	Required By
Jewson	782774	0.13	Enterprise Way, Fakenham	AC	17/01/05
Jewson	790550	5.70	Enterprise Way, Fakenham	AC	17/01/05
A Focus	790035	5.36	Gapton Hall Road, Gt Yarmouth	AC	17/01/05
Homebase	772942	1.00	, Sprowston	AC	17/01/05
Homebase	790998	5.40	, Sprowston	AC	17/01/05

In order to do this we will do the following:

- Start the job wizard.

- Select Aggregate Industries as the client.
- Enter the appropriate rate information for all five jobs in total.
- We want a generated load number so click Next, then when the warning appears, click Next again.
- Select the collection point; in this case it is AC.
- As the goods are all required by the 17/01/05, set the collection date to 16/01/05 and time as AnyTime.
- Now enter five dockets using the order number as the docket number, and the weight in the weight box.
- Click the next button. You should see a collection with five dockets on it.
- Now add a delivery to Jewson at Enterprise Way in Fakenham, this should have a delivery date of 16/01/05 and a time of AnyTime. You are delivering "dockets" 782774 and 790550 to this point, so add those to the delivery. If the original jobs had any notes, add them to the delivery notes.
- Click the Next button, you should see the delivery has been added with two dockets on it.
- Now add the delivery for A Focus at Gapton Hall Road, Great Yarmouth and select the appropriate docket and remember to add any appropriate note information. The same delivery date and time apply.
- Click the Next button, review this new delivery and add a final delivery with the same delivery date and time for the last two "dockets" to Homebase in Sprowston.
- Alter the running order as you see fit and then create the job.

2.3.3.3 When should I changing the running order?

If possible it is best to change the running order before you click the "Finish" button to create the job. It will be a lot faster to make changes to the job such as adding/removing collections and/or deliveries, altering dockets, running order etc before you create the job as the system has much less work to do.

2.3.3.4 Why can I move one or more dockets from one collection to another?

Because docket numbers are unique within a job you have to first remove the docket from the collection it is currently in, and then recreate it in the correct collection. If the collection was previously attached to a delivery, removing it from the first collection will also from it from the delivery.

2.3.3.5 How can I move one or more dockets from one delivery to another?

First you must remove the docket from the delivery it is currently attached to, and then attach it to the correct delivery instruction.

2.4 Stock Movement Jobs

These are a special type of normal jobs, in that they will not be displayed on the client's call-in sheet and are intended for jobs where the goods do not move outside the client's organisation, e.g. warehouse clearance jobs.

Essentially they are identical to normal jobs, so follow the steps outlined in 2.3, with one exception, ensure that the "Is this job a stock movement job?" checkbox on the "Job Charging" page of the job wizard is checked.

2.5 Pallet Return Jobs

These jobs are used to collect pallets from a point and then de-hire those pallets against one or more client pallet balances.

2.5.1 Adding a Pallet Return Job

To create a new pallet return job you must choose the "Pallet Return" option from the "Add New Job" option in the "Job" menu, this will cause the add/update pallet return job page to be displayed on the page.

On this page you must enter a load number for this job, specify the collection of pallets from a single point, and then specify one or more de-hires at a de-hire point. Supplying the load number is simple, so we won't cover that in depth.

2.5.1.1 Specifying the collection of pallets

In order to collect pallets from a point and place them on a trailer we need to add a pallet collection instruction. These work very similarly to a collection on a normal job, simply specify the collection date and time, along with the collection point. Once you have chosen the collection point the number of pallets currently at that location will be displayed in brackets next to the Number of Pallets textbox. Simply enter how many pallets you wish to collect and click the "Add Collection" button to confirm the collection.

2.5.1.2 Specifying the de-hiring of pallets

Once you have created one or more pallet collections you can then create one or more de-hire pallet instructions by clicking the "Add De-hire" button. This will allow to specify with client you are going to de-hire the pallets against, where and when this specific de-hire will take place, and how many pallets will be de-hired against this client.

2.5.1.3 Creating the job

You can change the running order of collections and deliveries, edit collections and deliveries in the same manner as with a normal job. Once you are happy with the job, click the "Add Job" button. This will create the job and report the job id at the top of the page above the load number.

2.5.2 Updating a Pallet Return Job

In order to edit a pallet return job you must first either click the "edit job" link in the Traffic Sheet, job details page, or job sheet. This will open the add/update pallet return job page with the correct job information loaded.

Just as when you were creating the job, you can alter the collection and de-hire instructions by using the buttons that affect the running order, editing of the instruction, and removing instructions. It works exactly as before, but may take more time to process.

The same important notes apply from updating normal jobs (see 2.3.2).

2.6 Goods Return Jobs

These jobs are used to collect previously returned or refused goods from a point and return them to a client at a specified point.

2.6.1 Adding a Goods Return Job

There are two ways to begin creating a new good return job and both are covered in the following sections.

2.6.1.1 Creating a Goods Return job from scratch (the hard way)

To start creating a goods return job click the "Goods Return" option from the "Add New Job" option in the "Job" menu. This will cause the add/update goods return job page to be displayed.

First you must select the client who owns the goods you are returning, you can not continue until this has been done. Then you must click the "Add New Collection" button, first select the point where the goods you wish to return are stored, this will cause a list of returnable goods at that location to be displayed, simply check the ones you wish to return, enter the date and time for the return and click the "Add Collection" button.

2.6.1.2 Identifying the Goods to return and creating the job (the easy way)

The easier (and preferred way) to create a goods return job is to first identify the goods to return and create a job to return those goods. In order to do this, you must select the "Outstanding Goods Refused Report" from the "Goods" menu, and filter the list to a specific client. This will cause all the goods which are listed as "At Store" to have a checkbox by them, simply check the checkboxes for the goods you wish to return and click the "Create Job" button. This will pre-configure a goods return job that makes the necessary collection which is defaulted to AnyTime tomorrow.

Once you have completed the collection of the goods to return you can specify the return point to take the goods to. Simply click the "Add New Return" button, specify the point you will take the goods to along with the date and time to specify the return portion. You will need to specify if you intend to "Return" (Drop) goods at the point, or "Leave" goods at the point. Remember to set the load number and total charge for the job then click the "Add Job" button to create the job; this save the job's details and set's all the goods you've selected to be returned to "In Progress".

2.6.2 Updating a Goods Return Job

In order to edit a goods return job you must first either click the "edit job" link in the Traffic Sheet, job details page, or job sheet. This will open the add/update goods return job page with the correct job information loaded.

Just as when you were creating the job, you can alter the collection and return instructions by using the buttons that affect the running order, editing of the instruction, and removing instructions. It works exactly as before, but may take more time to process.

The same important notes apply from updating normal jobs (see 2.3.2).

2.7 Goods Collection Jobs

A goods collection job is when you intend to visit a delivery point to collect an amount of goods and then take them to a particular location, either for return, or for relocation. The key differentiator between goods collection and goods return jobs is that any refused goods entered whilst completing the call-in for the collection are automatically set to in-progress. Other than that the process is identical.

2.8 Cancelling a Job

2.8.1 Requesting that job be cancelled

Before a job is cancelled, it must first be marked as requiring cancellation, this is stop people from being able to arbitrarily cancel jobs without receiving the appropriate authorisation.

In order to cancel a job, you must access that jobs details page, and then clicking the "Cancel this Job" link at the base of the page. You can only cancel jobs that are Booked or Planned. When cancelling a job you must supply a reason for cancellation and mark the job as being marked for cancellation. When you have done this, click the "Cancel this job" button. The job will still appear as normal different until the cancellation has been confirmed.

2.8.2 Dealing with a job cancellation request

To view jobs which are awaiting cancellation, access the "Job Cancellation" page via the "Process Cancellations" option in the "Job" menu. You can use the filtering controls to see which jobs have been marked for cancellation.

With each job in the list you can see who the job is for, who cancelled it, and when. There are also two buttons, one to reinstate the job, which basically denies the request to cancel the job, and the other which approves the cancellation.

2.9 Searching for a Job

2.9.1 How to search for a job

In the top right hand corner of each page that features the menu bar, there are a series of controls which allow you to search for jobs. There is a dropdown list which allows you to search for jobs in all states or in a particular state, a text box into which you enter your search criteria, and a green arrow button which processes the search.

When you process the search the results are shown on a page which defaults to a date for jobs in the last week. You can of course change this to whichever date range you need to search over.

The matched jobs are shown grouped together by client and ordered in such a way that the job with the earliest starting leg is shown first.

2.9.2 What can I search for in a job?

When you are searching for a job, the following parts of the job are searched across:

- Client
- Load Number
- Docket Number
- Client Reference
- Driver Name
- Vehicle Registration
- Trailer Reference

3 Planning

3.1 Traffic Sheet

You can access the Traffic Sheet by selected the "Traffic Sheet" button in the menu bar, or selecting the "Traffic Sheet" option from the "Job" menu.

3.1.1 Understanding what the Traffic Sheet shows

The traffic sheet shows you jobs that require planning that match the settings in the current filter. You can access the current filter by expanding the "Sheet Filter" bar, located just beneath the menu area.

Once expanded the traffic sheet filter area allows you to specify:

- one control area (Fakenham / Northwich)
- a combination of traffic areas (East Anglia / London / Midlands / North / North East / Scotland / South West / Yorkshire)
- if you wish to exclude points (see 3.1.4)
- the grouping style to apply
- a list of previously saved filters
- the earliest date and time to consider
- the latest date and time to consider

To process the filter, click the filter button, this will cause the page to be refreshed based on the new settings.

Whenever you click on the "Traffic Sheet" button or the "Traffic Sheet" option in the "Job" menu you will be presented with the results defined by your default filter.

When the traffic sheet is displayed an extra window is opened, this window is labeled "My Resources" and displays resource based on the filter settings.

3.1.2 How the Traffic Sheet decides what you need to plan, and what you can plan with

When the traffic sheet looks for jobs that you need to plan it looks at two key pieces of information:

- does the job need anymore planning
- does the job have legs that need planning that are "owned" by areas specified by your filter

When it looks for resources you can plan with it looks at these two pieces of information:

- is the "resource owner" specified by your filter
- is the job is coming into your area

3.1.2.1 Who owns which jobs?

When a job is created the job owner is calculated for you, the first instruction (normally a collection) will take place at a specified point, which in turn will have a traffic area, and that traffic area appears within a control area. Every leg of the job will initially be owned by one are, these can change during the course of the job though.

For example, a job for Wisbech Roadways collecting from Leverington Road will be set to be a Fakenham – East Anglia job and will be planned by whoever has their filter set to Fakenham control area and has the East Anglia traffic area ticked.

3.1.2.2 When does a job need more planning?

A job requires more planning if one or more of it's legs are Booked or Planned, once the whole job is In Progress, you no longer need to plan it.

3.1.2.3 Who owns which resources?

A resource is owned by a control area and traffic area combination. For example, if you are planning Fakenham – East Anglia jobs you will be planning with resources that are also set to Fakenham – East Anglia. The owner of a resource can be set in three ways:

- by updating the resource details
- by using the obtain resources page
- by handing the job over to a new planner

3.1.2.4 Which jobs are coming into my area?

A job is coming into your area if it's last instruction (i.e. delivery, pallet de-hire, pallet drop) is within a traffic area specified by your current filter.

For example, if a job is delivering goods to Jewson at Fakenham, that instruction is taking place within East Anglia and will be displayed as a job coming in for a planner whose traffic sheet is configured to show East Anglia jobs. It's important to remember that you don't need to plan jobs coming in, which is why it is not shown on the traffic sheet, but that you may be able to use those resources for planning a subsequent job.

3.1.2.5 Giving the job (or part of it) to another planner

There are two reasons to give someone one of "your" jobs to plan, i.e. move that job from your traffic sheet to someone else's. These reasons are:

- The job should never have appeared on your traffic sheet. In which case you should look at getting the traffic area for the initial instruction changed so that this does not keep happening.
- If you have planned part of the job, but the second part is someone else's responsibility. For example, you may plan the load out of your area, but then someone else may need to plan the delivery after a trunk at a depot.

In order to give the job to another planner, you need to change the ownership of the job, or set that after a trunk point the rest of the job belongs to another planner. In the traffic sheet you can see the current owner of the job by looking to the right of the job row. There are two items there, followed by a Set button. To change the owner, select the appropriate control area and traffic area and press the Set button. You will be prompted for confirmation; press OK and the job will be removed from your sheet.

Aside from just moving the job to the other planner's list, it will also change the resources you used from your list to theirs, reflecting that they should now those resources for their jobs.

If you want to trunk a leg and give every leg after the trunk point to another planner, select the control area and traffic area combination whilst performing the trunk. Everything before the trunk point will require planning by you; everything after the trunk point will become the other planner's responsibility. Giving the planner parts of a job like this will not move resources onto his resource list, it is used to give the planner an early alert that he has some planner to do in the future, in order to give him those resources you can set the job's controller after you have told the driver that is taking the load out of your area (see 3.2.2).

3.1.3 Traffic Sheet Filters

You can create as many filters as you wish, but only one can be your default filter.

3.1.3.1 Setting Default Filter

To configure the default filter, select the "List My Filters" option from the "Traffic Sheet Filters" option in the "Job" menu. This will show you your currently active traffic sheet filters. On the right hand side of the page are buttons marked "Deactivate" and "Make Default".

If you deactivate a filter, you can retrieve it at a later date by clicking the "Show Deactivated Filters" checkbox, finding the filter in the new list and clicking the "Activate" button.

To make a filter your default, click the "Make Default" button for the selected filter. If you now visit the Traffic Sheet you will find that your default filter has been applied.

3.1.3.2 Creating a new Filter

To create a new filter, you must first start with a Blank Filter, so pick the "-- Blank Filter --" option from the Load Filter dropdown. Configure your filter as required, type a name for the Filter and click the "Save Filter" button.

3.1.3.3 Updating an existing Filter

To update an existing filter, select the filter from the Load filter dropdown. Configure the filter as required and click the "Save Filter" button.

3.1.4 Excluding Points

You can configure the traffic sheet to exclude any job that stops at a given point. To do this you must first configure the points you wish to exclude.

This is done by clicking on the “Configure the Points to Exclude” link in the Traffic Sheet Filter area. Use the familiar collection of boxes to specify the points you wish to exclude and click the right pointing arrow button to add to your list of excluded points. To remove an excluded point from your list, select the point on the right hand side and click the left pointing arrow button to remove it from your list.

It is important to remember that all your traffic sheet filters share the same set of excluded points and that those jobs will only be excluded if the “Filter Out Excluded Points” checkbox option has been checked.

3.2 Obtaining Resources

To obtain resources to plan with you must assign those resources to the relevant traffic area i.e. if you are planning jobs that are owned by Fakenham – East Anglia you need to assign the resources to Fakenham – East Anglia.

3.2.1 Finding Resources you can take from other Planners

If you are struggling to find enough resources to plan your remaining jobs you may be able to take resources from another planner to help you out. To do this, you can use the “Obtain Resources” link displayed in My Resources, or use the “Manage Resource Controllers” option in Resources menu.

Once the page is open, you need to specify which traffic areas to query, the date range, and the resource type. For example, if you have a load coming out of Chelmsford that is a Fakenham – East Anglia job, but you don’t have enough resources to do the job, you may be able to take a resource from the London area to do the job. In this case you would select the London checkbox, the resource type and the date range – this will typically be before when you need to the collection for.

When you click the “Filter” button, all the resources that stop (i.e. have a leg that either starts or ends) in London between the data range you’ve selected are shown. You can click on the resource name to see their schedule, see who they are currently assigned to, and look at their start time if one has been entered. This start time will be for the day that you specified as your start date. You can now talk to the planner that owns that resource to see if you can take them, which you do by changing the Contoller boxes to Fakenham – East Anglia (in this case) and clicking the “Assign” button. The resource is now yours.

3.2.2 Giving Resources to another Planner

To give resources to another planner you essentially give that planner the job those resources last worked on, this moves the resources onto their resource list.

This can be done in the ways covered in 3.1.2.5, but can also be done in the communications page. The rational behind this is, that once you have communicated the job to the driver (and they have accepted), you would then give those resources to the receiving planner.

This is done in the same manner as in the traffic sheet, except the necessary controls are also on the communications page. Simply select the control area and traffic area combination, click the “Set” button, then confirm the action by clicking the “OK” button when prompted.

3.3 Planning a Job

As a planner your main role is to take a job from Booked to In Progress, in order to do this you must be able to assign resources to a job. In order to do this you will frequently be expected to do perform the following actions:

- trunking (splitting a leg in two to visit an intermediary point)
- attaching a destination (to take resources to a specific point at the end of a job)
- removing legs (cancelling a trunk leg, resource movement leg, or destination attachment)
- sub-contracting (instructing a third party to perform the job)
- update timings (enter realistic leg running times)
- assigning resources (attaching a resource to a leg)
- removing resource (cancelling a resources involvement on a leg)

There is one page in the system that allows you to do all these things, and that is the planning page which is accessible when you manage a job. You can find it by clicking the PLN button in the top right hand corner when you have decided to manage a job (typically by clicking the job id link from the job sheet, traffic sheet, or job search page).

3.3.1 Trunking a Leg

When you trunk a leg you need to know three things:

- Where are you going to trunk to?
- Are you going to use the same driver and vehicle after the trunk point?
- Who will be responsible for planning the legs after the trunk point?
- Roughly when you intend to arrive at the trunk point.
- Roughly when you intend to leave the trunk point.

To trunk a leg, click the "Trunk" button to the right of the leg you wish to trunk, this will cause the main job display to be hidden and new controls be displayed.

You can specify the place you wish to trunk at by selecting the organisation that owns the point, and then selecting the point to trunk at. If you are trunking to a special place i.e a lay-by or service station, you may need to create a point. In this case you should make the point belong to Jack Richards, and select the closest town, you may need to specify the address (doesn't need to be the right one), whilst you do this make sure the traffic area is correct.

If the leg you are trunking already has a driver and vehicle assigned to it, and you want them to stop working on the job once they arrive at the trunk point leave the Driver and Vehicle checkboxes unchecked, if however you want the same driver and vehicle to take the load on from the trunk point, check them both.

Once you've selected the point the leg is to be trunked at, you will be able to specify which planner has to plan the legs after the trunk point. By default the area that owns to point you are trunking at will be selected, but you can change this to a custom area.

You can also set the time to arrive at the trunk point, and the time to leave that point. By default the time to arrive at the trunk point is 2 hours after the start of the leg, and the time to leave the trunk point is 2 hours before the end of the leg. You can change these timings to reflect your situation, just as long as the times are sensible i.e. you can not arrive at the trunk point before the start of the leg, nor can you leave the trunk point after the end of the leg.

When you are happy with the trunking settings, click the "Trunk" button, if at anytime you want to cancel the trunking procedure, click the "Cancel" button.

3.3.2 Attaching a Destination

When you attach a destination you need to know three things:

- Where are going to send the resources to after the job has finished?
- Which resources are going to be sent to the destination?
- What is the estimated travel time required to reach the destination?

To attach a destination to a job, click the "Attach Destination" button below all the legs, this will cause the main job display to be hidden and new controls be displayed.

You can specify the destination to attach by selecting the organisation that owns the point, and then selecting the point to attach. If the point you wish to attach does not exist, you will need to create it.

You can then select which of the resources should make this journey, for instance, if you wish to leave the trailer at the last delivery point on the job, leave the trailer unchecked, but check the driver and vehicle checkbox.

The travelling time will be used to work out the length of the leg, enter the amount of time you anticipate this leg to take to take.

Once you are happy with the destination settings, click the "Attach", if at anytime you want to cancel the attaching a destination procedure, click the "Cancel" button.

3.3.3 Removing a Leg (Cancelling a Trunk, Destination Attachment or Resource Movement Leg)

Sometimes, you may wish to undo a change to the job you've made, for instance, you originally planned to trunk a leg to Wisbech Depot, but now you wish to trunk it to Fakenham Depot instead, or you wanted the driver to travel on to another location, but have now decided that isn't appropriate.

To remove a leg, you need to click the "Remove" button to the right of the leg information on the planning page. In the case of an attached destination, this will remove the whole leg. If you are removing a trunk point, it will move the end point of the following leg into this leg, and delete the following leg – but it will retain timings you have imposed on the leg you have "removed" – this is to stop causing scheduling issues.

3.3.4 Sub-Contracting a Job

On occasion you may not have enough resources to satisfy a job's requirement; in this case you need to sub-contract that job to a third party.

You can only do this if you have not assigned any driver or vehicle resources to the job, then a “Sub-Contract” button is displayed at the base of the legs on the planning page. In order to sub-contract the job, click the “Sub-Contract” button, this will cause the main job display to be hidden and new controls be displayed.

You must first select the sub-contractor to sub this job out to, and then enter the price you are going to pay the sub-contractor for fulfilling this job. The third option allows you to either use a sub-contractor’s trailer, or one of your own. If you wish to supply the trailer, uncheck the checkbox, otherwise, leave it checked and press the “Confirm” button, if at anytime you want to cancel the sub-contracting procedure, click the “Cancel” button.

If you wish to cancel the subbing out of the job, you can click the “Bring back in-house” button to do so; this will return the job into a state you can plan.

3.3.5 Updating Leg Timings

In order to reflect the planned running time of the legs that make up the jobs it may be necessary to update the leg timings from time to time. When the job is created the leg timings are calculated based on the requirements of the job instructions, this is to ensure that if a delivery is booked in for 3am, the leg taking the goods there will arrive before 3am.

In order to change the leg timings you need to enter the appropriate timing information and then press the “Update Timings” button at the base of the page. If you have made a mistake you should click the plan button at the top of the page to reload the job details.

There are some things to bear in mind when updating the timings attached to the legs on the job:

- Legs that share resource can not overlap, as a driver, vehicle or trailer can not be running two legs at once.
- Legs can not finish before they start.
- Legs should meet the requirements of any instruction (Load, Drop etc) on those legs. You can override this, but you will be prompted. If you are met with the prompt, but are certain that you want to use the timings entered, click the checkbox beneath the prompt and press the “Update Timings” button again.

3.3.6 Assigning a Resource

Obviously, at the core of the planning functionality is the ability to assign resources to parts of a job. In order to assign a resource to a job that resource must be:

- Available for the times attached the legs you have assigned that resource to.
- Available for a period of time before the start of the first leg you wish to assign so that the resource can travel (if required) to collect the other resources on the leg, and then go onto the start of the leg.

There are two main actions performed when assigning a resource:

- Specify which legs the resource will take part in.

  - This is done by checking the relevant checkboxes for each leg, for example to assign a driver only to a leg check the driver checkbox, if you wish for their usual vehicle to be used also, check the vehicle checkbox too. This flags this leg as being assignable.
- Specify which resource to assign.
  - You can find the resource you want to use in the resources panel (shown on the left of the page) and then press the relevant "Assign" button. This will then cause the system to attempt to assign the resource selected to the flagged legs in the appropriate resource slot.
  - Or, if the resource you want to use is already being used on other legs in the job, you can just click the resource description i.e. the driver's name, vehicle's registration number, or trailer's reference number and then press "Ok" when prompted.

3.3.6.1 Assigning a Driver

In order to assign a driver to a job, you must first decide whether or not you wish you assign just a driver, or also assign the driver's usual vehicle. If you wish to just assign the driver, or they have no usual vehicle to pick up, you should just check the driver checkbox, if you wish to assign a driver and a vehicle, you should check both.

Once you have determined which legs you wish to assign a driver to, locate the driver you wish to assign and assign the resource as specified in 3.3.6.

3.3.6.2 Assigning a Trailer

In order to assign a trailer to a job, you must first select the legs you wish the trailer to take part in, normally this will be all the legs. To reflect this, when you check a trailer checkbox all the trailer checkboxes beneath the checked box will also be checked, if you wish you uncheck a checkbox this will only uncheck that checkbox.

Once you have determined which legs you wish to assign a trailer to, locate the trailer you wish to assign and assign the resource as specified in 3.3.6.

3.3.6.3 Assigning a Vehicle

In order to assign a vehicle to a job, you must first select the legs you wish the vehicle to take part in. To indicate you wish to assign a vehicle to a leg, check the vehicle checkbox.

Once you have determined which legs you wish to assign a vehicle to, locate the vehicle you wish to assign and assign the resource as specified in 3.3.6.

3.3.7 Removing a Resource

On occasion you will want to remove a resource from a job, for example if the resource can no longer perform the planned activities or you simply change your mind. In order to remove a resource from a job, check the checkboxes for the relevant resource slot on the legs and then click the "Remove

Assignments" button at the bottom of the legs section. This will cause the system to remove the selected resources from the specified legs.

3.3.8 Checking Assignments

From time to time you might want to double check your assignments, for instance you may receive a pop-up indicating that the resources on a specific job need attention. Click the pop-up message, open the planning page, and then click the "Check Assignments" button at the bottom of the legs section. This will cause the system to double check all the resources and there locations on each of the legs. There are two main reasons why you would want to check your assignments:

- If one of the resources on your job is taking part in a previous job, and the end point of that job changes, the start point of your job will also be altered.
- From time to time the system may determine that the trailer should travel from its start point to the end point by itself, this will leave the job in a "Booked" state. You can get around this by either assigning the driver and vehicle to the trailer's resource movement leg, or by checking assignments.

3.4 Communicating to a Driver

Once you have planned a job, by ensuring that the next part of the job can proceed, you need to communicate your plan to the driver. This must be done whenever you change the plan by doing any of the following:

- changing an aspect of the driver's role in the job
- changing the resources a driver will use whilst completing the job
- changing the time the driver will perform the job

To access the driver communication section of the system you must click the Communication button in the cluster of six buttons in the job management areas.

A drop down box is populated on the page that contains the name of all the drivers you can communicate with at this time, i.e. all the drivers that are taking part in "Planned" legs can be communicated with. To continue, select the driver you wish to communicate with, and then specify the method of communication. The comments and SMS information is pre-entered for you, feel free to overwrite this with your own comments. Set the driver's response and then press the "Communicate" button at the bottom of the page. This will cause the communication to be stored and the appropriate changes to be made to the job state.

Once a communication has been made it can be updated, for example, if you call a driver but there is no response, he may get back to you to accept the job, in which case you need to edit the communication and change the status. Within the communications you have made, you will see a "Printer Friendly" button; this is to be used to provide a driver with a print out summarising the job when they arrive at the hatch.

4 Recording Call-in Information

In order to complete a job each of the call-ins attached to the job need to be recorded, by doing this you are effectively telling the system that the different parts of the job have been completed.

The call-in procedure can get pretty complicated, but basically breaks down into five portions, each of which will be dealt with in turn:

- Recording when the driver arrived at and departed the location.
- Recording the relevant information dependant on the type of instruction.
- Dealing with PCVs that were issued or updated during the course of the instruction.
- Dealing with pallets that are placed on the trailer (only for Normal jobs).
- Recording any refused or returned goods that pertain to the instruction.

4.1 Recording the Arrival and Departure time

Recording the arrival and departure time for the instruction is extremely simple, in the top left hand portion of the page there are four controls, two take dates and the other two take the times. Simply enter the relevant information and proceed to the next step.

4.2 Recording the Call-in data

The type of call-in information you will be recording during this step depends largely on the type of call-in you are taking. There are seven different types of call-in you can record, although there are core components that apply to all of them, there are significant differences between them:

4.2.1 Collection of Goods

When recording the collection of goods, there is no real information to enter as the data for the number of pallets/cases/weight collected are all entered during the delivery call-in.

4.2.2 Delivery of Goods

When recording the delivery of goods you will need to enter the following information about each docket being delivered. The information you need to supply is as follows.

- Quantity of Cases despatched (i.e. collected) and delivered.
- Number of Pallets despatched and delivered.
- Number of Pallets returned.
  If this is less than the number delivered, you will be prompted for a PCV.
- Amount of Weight despatched and delivered.
- Shortage Reference.
  Some client customers may issue shortage references, when this applies enter the information here.

If the system detects that you should have had a PCV issued it will prompt you that you should ask the driver for the details, but will not enforce that you must have entered a PCV before it will let you continue.

4.2.3 Dehiring of Pallets

When you are dehiring pallets there are two potential paths, you dehire the pallets and receive either a client or a CHEP receipt. Essentially all you need to record is the type of receipt obtained, the receipt number, and the number of pallets dehired. This number is then reduced from the relevant client pallet balance, and also the trailer pallet balance.

4.2.4 Leaving Pallets

Leaving pallets is even simpler, you only need to specify the number of pallets being left and the relevant pallets are removed from the trailer pallet balance and added to the point pallet balance.

4.2.5 Picking up Pallets

When picking pallets up, for a pallet return job for instance, you only need to enter the number of pallets collected; this number of pallets is then removed from the point pallet balance, and added to the trailer pallet balance.

4.2.6 Leaving Goods

When leaving goods there is nothing additional, all the goods will be altered to being "At Store" and "Outstanding".

4.2.7 Return of Goods

When returning goods you need to enter the receipt number for the job, along with the receipt number for each of the goods returned. All the goods will be altered to "Returned" and being at an "Unknown" location.

4.2.8 Core Information

Whenever you enter call-in information you will always have the option to enter any Discrepancies and Driver's Notes that may apply. This information is not intended to be used to duplicate information such as refused items, but would be more appropriately used to store information that may support a late demurrage claim.

4.3 Dealing with PCVs

An important part of managing the pallet balances for clients, points and trailers are PCVs, essentially if a smaller number of pallets are returned than expected you will be prompted for a PCV.

4.3.1 Adding a new PCV

To add a new PCV you must click the "Add PCV" button that appears after the call-in, this will cause a small wizard window to appear in the middle of the page.

The information stored on this page refer to the information found on the actual PCV. Normally the Status will be "Outstanding", Redemption Status will be "To Be Redeemed, the Number of Signings will be 1 and the PCV will be checked for Scan Later (unless you have the document to hand). The Reason for Issuing will differ from PCV to PCV so make sure you choose the appropriate option, and then enter the number of pallets received and returned. Then enter the voucher number that is printed on the PCV.

The next few pages relate mostly to actually scanning the PCV, normally you won't have the actual document with you so you will normally press Next, followed by Yes, and then Close.

4.3.2 Updating an existing PCV

When a PCV has been taken back for redemption there are three things that can happen:

- The PCV was redeemed and the pallets were returned.
  In this instance you should set the PCV to "Redeemed" as that PCV has been satisfied.
- The PCV was not redeemed, but was signed again.
  You should update the PCV and update the signature count as required; you will need to scan the new version of the PCV when it returns to the office so mark it as Scan Later.
- The driver forgot to redeem the PCV in which case its state has not altered so no updating is required.

To update a PCV simply click the voucher number in the PCV list below the core call-in area, you are then using the same process as described in 4.3.1.

4.3.3 Scanning a PCV

When you need to scan a PCV you will also be within the wizard discussed above, the main change is to make sure that the "Scan Later" checkbox is not checked then click the "Next" button to advance to the "Scan PCV" page.

This page is basically all about the scanning of PCVs, you should take the PCV and insert it in to the document scanner with the printed side of PCV face down, with the barcode appearing on the right hand side of the PCV (i.e. upside down). When you have done this click the "Scan" button. The document scanner will scan the document, transfer the data to your PC and allow you to view the scanned image (which you should do just to check the scan) and then go onto the next step, by clicking the "Next" button.

The next step is to enter or check the voucher number that was supplied, if you scanned the form correctly you should the area of the PCV that contains the voucher number, simply double check the voucher number and correct if necessary. Click the "Next" button to open the "Submit Form" page and then click "Next" again to submit the form. You should then receive a message indicating the upload succeeded, click the "Close" button as you are now finished with the wizard.

4.4 What to do with the Pallets

When a call-in is recorded there is normally going to be pallet traffic, for example pallets with goods on coming off the trailer and, hopefully, empty pallets being replaced. But over time we will run out of space on the trailers for pallets so those pallets need to be either taken off or dehired straight away. This is accomplished by using special types of instructions, called "Pallet Handling" instructions. These instructions come in two flavours:

- Leave Pallets
  When you instruct the driver to leave pallets at a location the specified number of pallets are removed from the trailer pallet balance and added to the point pallet balance.

- De-hire Pallets
  When you instruct the driver to de-hire pallets at a location the specified number of pallets are removed from the trailer pallet

balance, and the client pallet balance to indicate that they have been de-hired.

In order to add one of these "Pallet Handling" instructions to a job you must click the "Handle Pallets" button on the call-in page, this will cause an additional leg to be added to the job which will take the driver to the location you have specified to perform the pallet handling. Bear in mind that as you are altering the job you may need to deal with resourcing issues that arise, i.e. someone may have planned to use this resource after the current job, but now you are taking that resource elsewhere to handle pallets, that may not be possible.

When you click the "Handle Pallets" button a new part of the page will be opened, this part of the page asks you if you wish to Leave or De-hire the pallets and the location you wish this pallet handling to happen. If you choose to de-hire the pallets you will be asked to supply the client that the pallets should be de-hired against. Also supply date and time that you should arrive at the pallet handling location – this becomes the Booked Date and Time. To add the pallet handling instruction to the job, you should click the "Update Call-in" button; this will ensure the relevant changes are made to the job. To remove a pallet handling instruction from a job, press the "Remove Handling" button that appears in the place of the "Handle Pallets" button, this will remove the instruction and the leg that would have taken the resources to that location. You can only do this up until the point that the pallet handling instruction itself has been called in.

4.5 Recording Refused and Returned Goods

From time to time you may be forced to take goods back either from the current delivery (refused goods) or from a previous delivery (returned goods). To make sure that these goods are dealt with and tracked correctly the details of any goods refused or returned must be entered into the system.

On the call-in page you are going to be mostly concerned with the right hand side of the page where the goods section is located. This is split into two sections, the top part allows you to describe the goods that have been returned or refused, and the lower part shows you which goods have been returned or refused during the execution of this instruction. You can select one of these goods to update, in case you got something wrong, or delete in case you want to remove it altogether.

The table that follows documents what each of the parts of the refused or returned goods and what they mean to you. The required items are emboldened.

Field	Description
Goods Type	Return or Collect. If you have had goods refused from the current delivery, set this to Return, otherwise it is Collect.
Product Name	The name of the product that has been refused.
Product Code	The product code of the product that has been refused.
Receipt Number	The receipt number assigned to the goods, this number may not always be issued at this time.
Pack Size	The pack size of the goods returned.
Quantity Despatched	The quantity of the goods despatched.
Quantity Refused or Returned	The quantity of the goods refused or returned.
Reason	The reason the goods have been refused, you

	must select from: Refused to Accept Delivery, Shorts, Damaged, Wet, Not Ordered, Other.
Status	The status of the goods, you must select from: Outstanding, InProgress, Returned, Cancelled, Dumped. This will normally be Outstanding when you first get the goods.
Current Location	The current location of the goods, you must select from: OnTrailer, WithDriver, AtStore, Unknown. This will normally be OnTrailer or WithDriver when you first get the goods.
Return to Supplier By	The timeframe before you must return the goods.
Notes	Any additional notes that apply to the goods.
Location the Goods should be Returned to	If you know where these goods must be returned to specify it here.
Location the Goods will be Stored at	You must know where you are going to store the goods, unless the reason for refusal is Shorts – in which case the goods don't exist so you can't return them.

Once you have entered the goods information as best you can, press the "Store Goods" button, if all the validation passes, you will see the goods information appear into the lower part of the goods area and the text boxes will be cleared. If you wish to alter anything, you can press the appropriate "Edit" button and alter the details as before, to remove some goods press the "Remove" button. Bare in mind that you cannot remove or alter goods that are set to "InProgress" as they are in the process of being moved or returned.

5 Booking In PODs

Once the job is completed the next stage is to get to a situation where it is "Ready to Invoice", you can approach this objective in two orders, you can either price the job first, then book the PODs in, or you can book the PODs in first, then price it. It won't make any difference to the job, so it's entirely up to you. We'll go through the booking in process first as it's the next button in the group of six buttons shown in the job management pages.

When you book in PODs, you are basically attaching a scan or description of a POD to each individual docket that was delivered during the course of the job, we've already got the job details in the system, but we don't have the relevant POD information. So as part of the "Booking In POD" process we need to be able to scan those PODs in and attach the required information. There are two different ways to scan those PODs into the system, you can either scan PODs centrally, or do it as part of the attachment process. It is intended that most of the time you will be scanning PODs centrally so that you can split the workload between two people so that will be covered for.

5.1 Scanning PODs Centrally

If there are a stack of PODs that have come back from a driver then it makes sense to just get them scanned into the system and then worrying about attaching the POD to the appropriate docket later. To start the process of scanning a POD centrally visit the PODs menu and select the "Scan a POD centrally" option from the "Centralised POD Scanning" option. This will cause the POD scanning wizard to appear in the centre of the page.

In the first part of the POD scanning wizard you expected to enter simple information about the POD to aid the searching and attachment process later on down the line. You must supply the client that owns the job that was delivered, the ticket number that appears on the POD, and the signature date. You then have the option the "Scan Later", which you won't normally pick because normally you will have the document in your hand at this point.

Place the POD in the document scanner in the correct page order with the first page upside down and facing away from you. When you are ready the scan the POD click the "Scan" button, this will cause the POD to be scanned and you should then click the "View Scanned Form" button to check that the scan is as you expect. If you are happy with the scan, check the "The form has scanned successfully." checkbox and click the "Next" button, this will take you to the "Submit Form" page, where you should click the "Next" button, and when you receive the confirmation message, click the "Scan Another Form" button to scan another POD, or the "Close" button if you are done for now. This POD has now been scanned and is available for attaching to parts of a job.

5.2 Attaching a pre-scanned POD

Assuming that somebody has followed the steps dictated in 5.1, you should be in a position to attach PODs that have already been scanned to various parts of the jobs you are dealing with. There are two ways you can proceed when attaching PODs to a job, you can either deal with a specific job, or you can view all jobs for specific clients and go through them one by one, this second option will typically be faster for you.

If you wish to do this for a specific job, once you have found the job, usually via the search facility, you should click on the POD button in the cluster of six buttons whilst managing the job. When this page opens you will see a breakdown of the deliveries on the job on the left, with each docket featuring a radio button for attachment purposes, and on the right a list of pre-scanned PODs that match the client of the job. To attach a non-scanned POD you click the "Scan POD" link for the relevant docket and proceed as stated in 5.4, or to attach a scanned POD you select the radio button for the relevant docket, and then the radio button for the relevant POD and click the "Add to drop" button. This is much the same as the second option given below, which is covered in more detail, so you may wish to follow the next section first and then come back to this if you have questions.

If you wish to do this for a number of jobs, you should visit the Centrally scanned PODs page, you can find this page by clicking the "Centrally scanned PODs" option from the "Centralised POD Scanning" option in the "PODs" menu. When this page loads you will see, on the left hand side:

- A client box with a filter PCVs button.
- A list of PODs that have been entered into the system, but not attached to a drop.
- A button to Scan a POD.
- A button to Add a POD to a Drop.

5.3 Attaching a non-scanned POD

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5.4 Finishing the Booking In POD Process

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6 Pricing Jobs

7 Invoicing Jobs

8 Managing PCVs and Pallets

9 Managing Goods

10 Dealing with Organisations

10.1 Finding Addresses

11 Dealing with Resources

12 Dealing with Users

13 Other parts of the system