

Appointment and Scheduling Customer User Guide

Contents

1. Working on Appointments.....	2
1.1. Introduction.....	2
1.2. Login to the Appointment System.....	3
1.3. Getting Started with the Appointment System.....	5
1.4. Appointments.....	5
1.5. How to book an Appointment.....	6
1.6. How to Add an Email to an Appointment.....	10
1.7. How to Cancel an Appointment.....	12
1.8. How to Edit an Appointment.....	14
1.9. How to Share Appointment Details.....	15
1.10. How will the System notify you when there are changes to your Appointments or Containers.....	17
1.11. How to add a Motor Carrier to your Appointment	19
1.12. Advance Filters.....	21
1.13. Managing Views.....	25
1.14. Managing Columns.....	25
1.15. Downloading Appointments.....	26
1.16. Printing Appointments.....	26
2. Configuring Appointments.....	28
2.1. Configuring Location.....	28
2.2. Automating Appointments.....	29
3. Video Tutorials.....	35

1. Working on Appointments

The Appointment Management solution enables the **Terminals** to manage locations and appointment slots from their end, and Motor Carriers are able to consume this data, to book appointments for their containers.

The solution enables the users to make appointments for Pick-up, Drop, and Dual moves. The users can make an appointment by selecting a **Location** and an **Appointment Type**.

The user can choose any location that supports appointments through the Blume platform and this list is fetched from the Blume Maps solution. In addition, the solution permits the users to save containers and get notified of the status changes, if the container is not ready to be picked up at the time of booking.

Dashboard

My Appointments X

Appointments

Add Container

To be Scheduled

Scheduled

Ready172At Risk0All237

Todays2At Risk560All3k

0 Selected

Share Appointment

Cancel

Convert To Dual

Select Search...

<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP025412	2023-Sep-22	06:00 - 07:00			Completed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Dual	PICK752132	752132	DROP752132	2023-Sep-22	06:00 - 07:00			Confirmed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	PICK925412	925412		2023-Sep-22	06:00 - 07:00			Completed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Dual	PICK725412	725412	DROP725412	2023-Sep-22	06:00 - 07:00			Confirmed	

1.1. Introduction

The Appointment Management solution integrates and provides a single solution for appointment configuration (for Locations) and appointment booking (for Motor Carriers/ Beneficial Cargo Owners/Logistics Service Provider). Using this solution, **Terminals** is able to manage locations and appointment slots from their end, and Motor Carriers are able to consume this data to book appointments for their containers.

The Appointment Management solution enable truckers to make appointments to drop and pick-up international containers. At a grounded multi-mode terminal, container pick-up and drop is on a first-come, first-serve basis, and with no match between crane capacity and pick up times, drayage carriers can experience prolonged wait times.

The Appointment Management solution matches the capacity of the crane to incoming traffic, and enables Motor Carriers to make an appointment to pick up their selected container, improving the drayage carrier experience and flow of shipments through a facility.

The solution enables Location Owners and Operators to configure appointment windows, define constraints based on multiple parameters, manage users and communicate with their user base. It enables customers to add their containers, track

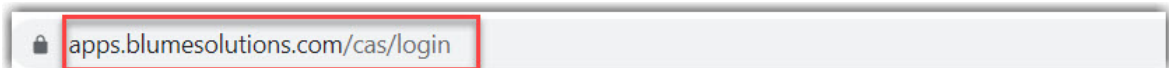
when they are ready for appointment and make appointments for Pick-up, Drop and Dual missions.

1.2. Login to the Appointment System

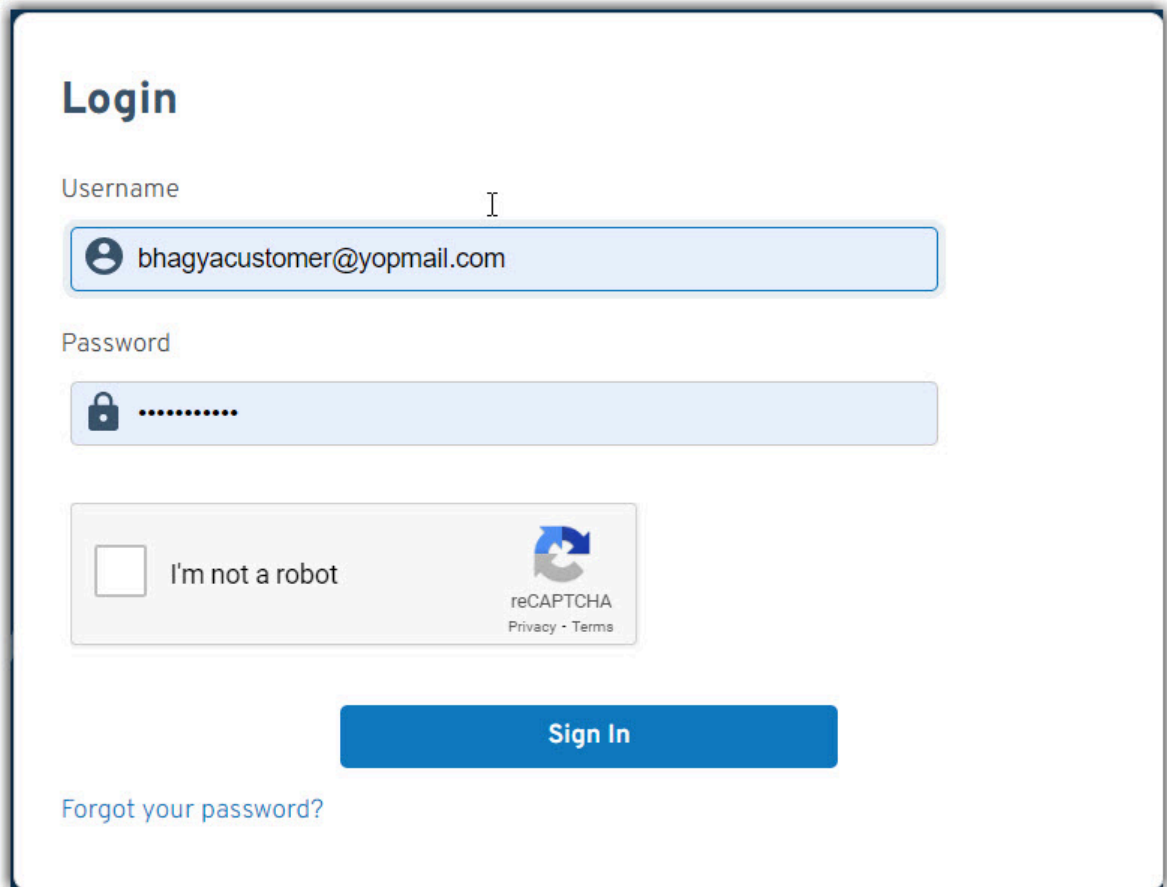
Users must be subscribed to the **Appointment Scheduling Solution** to have access to the **Appointment System**. The procedure outlined on the page enables the users to navigate to the **Appointment Scheduling Solution**.

Perform the following steps to navigate to the **Appointment Scheduling Solution**.

1. Navigate to <https://apps.blumesolutions.com/cas/login>




2. Specify the User name and Password on the **Blume Solutions** page displayed.




3. Enable the **I'm not a robot** reCAPTCHA check box and click **Sign in**.

Login

Username

 bhagyacustomer@yopmail.com

Password





I'm not a robot



reCAPTCHA
Privacy - Terms

Sign In

[Forgot your password?](#)



Note: Click **Forgot your password?** URL if you have forgotten your password.

Dashboard My Appointments X

Appointments

[+ Add Container](#)

To be scheduled			Scheduled		
Ready	At risk	All	Todays	At risk	All
25	0	190	3	45	668

0 Selected [Add Email](#)

Select Search...

<input type="checkbox"/>	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Dual	Date	Slot	Action
<input type="checkbox"/>	NS - Atlanta, GA - Austell	Drop			SMJH455	Yes		<input type="checkbox"/>	Select Date	Select Slot	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP789001	Yes		<input type="checkbox"/>	Select Date	Select Slot	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP789002	Yes		<input type="checkbox"/>	Select Date	Select Slot	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP789003	Yes		<input type="checkbox"/>	Select Date	Select Slot	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP789004	Yes		<input type="checkbox"/>	Select Date	Select Slot	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP789005	Yes		<input type="checkbox"/>	Select Date	Select Slot	
<input type="checkbox"/>	3PL Global -	Drop			DROP789006	Yes		<input type="checkbox"/>	Select Date	Select Slot	

The **Appointments** page is displayed.

1.3. Getting Started with the Appointment System

This section will provide details on the following information that enables the users to get started with working on the **Appointment Scheduling Solution**.

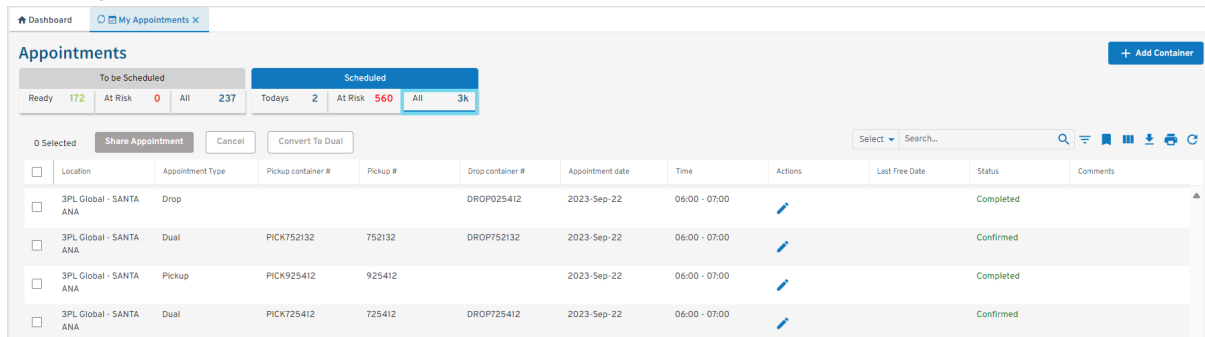
This guide is designed for the end users. The various modules and sections of the product are briefly explained, and the procedure to use them are described in a series of steps.

- [Login to the Appointment System \(on page 3\)](#)

1.4. Appointments

The **Appointments** page displays all the appointment details in a grid view. Users can view **To be Scheduled**, and **Scheduled** appointments in this page.

Users can **Add a Container**, book a **New Appointment**, **Edit**, **Reschedule**, or **Cancel** an existing **Appointment**.

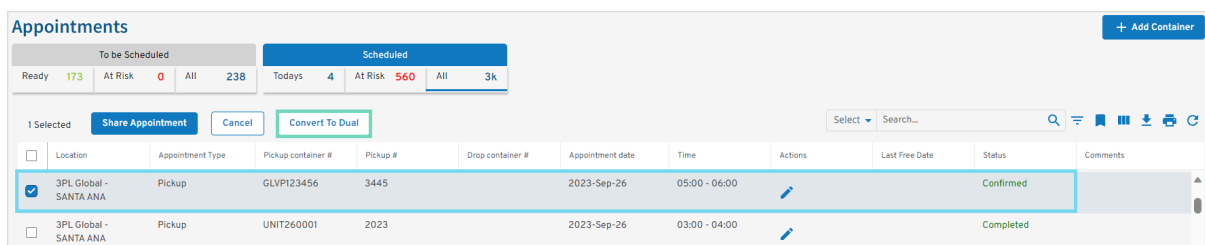


Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
3PL Global - SANTA ANA	Drop			DROP025412	2023-Sep-22	06:00 - 07:00			Completed	
3PL Global - SANTA ANA	Dual	PICK752132	752132	DROP752132	2023-Sep-22	06:00 - 07:00			Confirmed	
3PL Global - SANTA ANA	Pickup	PICK925412	925412		2023-Sep-22	06:00 - 07:00			Completed	
3PL Global - SANTA ANA	Dual	PICK725412	725412	DROP725412	2023-Sep-22	06:00 - 07:00			Confirmed	

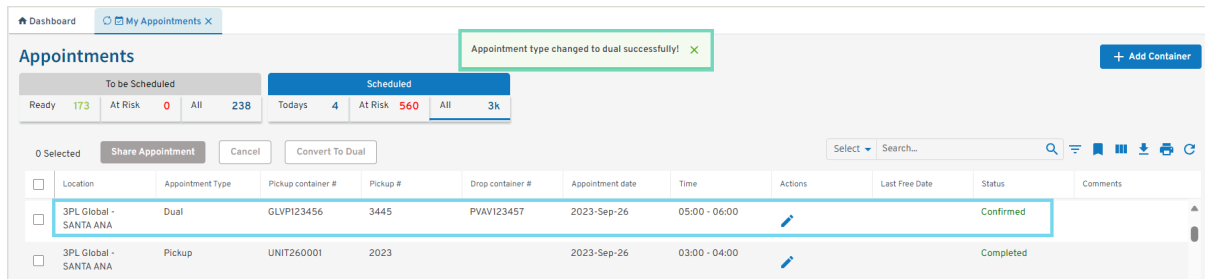
Users can **Edit Appointments**, **Filter Appointments**, **Manage Views**, **Manage Columns**, **Download Appointments**, and **Print Appointments** on this page.



Note: Users can convert a single appointment to Dual under the **Scheduled** tab. Converting an appointment to Dual includes ensuring the appointment is in **Confirmed** or **Confirmed-Tentative** status and validating pickup and drop conditions. The **Appointment Ready** status is updated to **Yes** if both containers are ready for pickup and drop.



Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
3PL Global - SANTA ANA	Pickup	GLVP123456	3445		2023-Sep-26	05:00 - 06:00			Confirmed	
3PL Global - SANTA ANA	Pickup	UNIT260001	2023		2023-Sep-26	03:00 - 04:00			Completed	



Appointment type changed to dual successfully! X

Appointments + Add Container

To be Scheduled				Scheduled			
Ready	At Risk	All		Todays	At Risk	All	
173	0	238		4	560	3k	

0 Selected Share Appointment Cancel Convert To Dual Select Search...

<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
<input type="checkbox"/>	3PL Global - SANTA ANA	Dual	GLVP123456	3445	PVAV123457	2023-Sep-26	05:00 - 06:00			Confirmed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	UNIT260001	2023		2023-Sep-26	03:00 - 04:00			Completed	

1.5. How to book an Appointment

Blume's Appointment Management System enables the motor carriers can consume this data to book appointments for their containers. The system permits the users to save containers and get notified of the status changes if the container is not ready to be picked up at the time of booking.

Users can perform three types of booking.

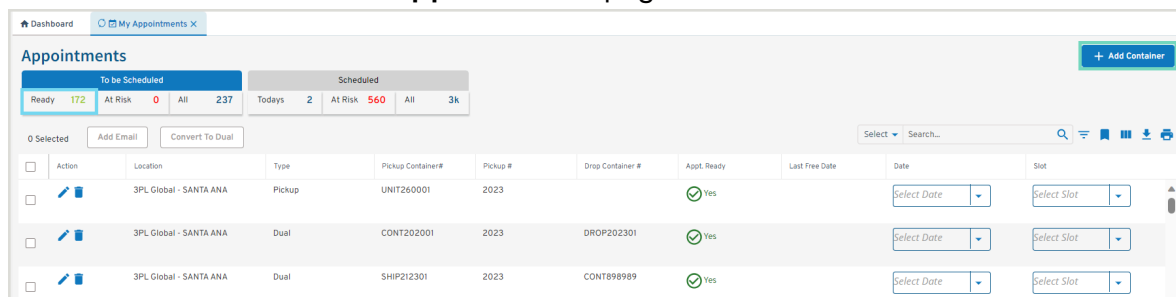
- **Pick Up:** Enables the users to book an Appointment only for Pick-up.
- **Drop:** Enables the users to book a Drop Appointment.
- **Dual:** Enable the users to Pick-up a container and Drop another in the same Appointment.

Perform the following steps to book an **Appointment**:

1. Navigate to the **Appointment Scheduling** **My Appointment** on the **Blume Appointment Management System**.



2. Click **Add Container** on the **Appointments** page.



Appointments + Add Container

To be Scheduled				Scheduled			
Ready	At Risk	All		Todays	At Risk	All	
172	0	237		2	560	3k	

0 Selected Add Email Convert To Dual Select Search...

<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	UNIT260001	2023				Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	CONT202001	2023	DROP202301			Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	SHIP212301	2023	CONT898989			Select Date	Select Slot

3. Select the **Location** and the **Appointment Type**.



Note: When users select **Dual** Appointment Type, they need to specify the Pick up Container number. The Enter Pickup Container field is mandatory.

4. Select the **Office**.

5. Specify the Container Number.



Note: The container number format allow users to enter container numbers with less than 6 digits. When a user enters a container number with less than 6 digits, the system will display the number as entered without adding any zeros.





Note: Users can add up to 20 container numbers. Users can either copy and paste the container numbers, or type the number in the field.

6. Click **Submit**.





Note: If the user added invalid container numbers, those containers will be left in the input box and only valid containers will be added to the **All Containers** list. Users can see the containers added in the **All Containers** column under the **To be Scheduled** tab.

7. Specify the Pickup number.

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	GLVP123456					Select Date	Select Slot







Note: Once the user provides the valid pick up number, the container will move to ready for pick up status if it is ready. If the user provides an invalid pick up number, they will have an option to change it. If the ready for pick up is false, user will be informed in the UI and via email when the container will become ready.

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	GLVP123456	3445			Yes	Select Date	Select Slot







Note: Users can edit or delete the container of their choice under the **Action** column.

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	GLVP123456	3445			Yes	Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	PICK7896785					Select Date	Select Slot



Note: Create Dual Appointments from Watchlist: Users can now select two containers on the Watchlist under the **To be Scheduled** tab and click the **Convert to Dual** button. For creating Dual Appointments, it includes selecting exactly two containers, one pickup and one drop container, both belonging to the same location, having the same receiver (with matching SCAC), and sharing the same originator. A new Dual entry is displayed at the top of the Watchlist, highlighting the Dual status. The **Appointment Ready** status is automatically updated to **Yes** if both containers are ready for pickup and drop. Users can select a **Date** and **Slot** for the Dual appointment if the appointment status is **Yes**.

2 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input checked="" type="checkbox"/>		Butler Intermodal Terminal	Pickup	SNQA1140520	P1			Yes	Select Date	Select Slot
<input checked="" type="checkbox"/>		Butler Intermodal Terminal	Drop			SNQA1140520		Yes	Select Date	Select Slot

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		Butler Intermodal Terminal	Dual	SNQA110516	PI	SNQA1140520	Yes		Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	CONT202001	2023	DROP202301	Yes		Select Date	Select Slot



Note: Saving a Container as Dual: Users can save a container on the Watchlist as a Dual by clicking the **Convert to Dual** button. For saving a container as Dual, it includes validating its readiness for pickup and drop. The **Appointment Ready** status is updated accordingly. Users can select a **Date** and **Slot** for the Dual appointment if the appointment status is **Yes**.

1 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input checked="" type="checkbox"/>		#1 & SPOT	Drop			TEST121211	Yes		Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	CONT110906	2023				Select Date	Select Slot

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		#1 & SPOT	Dual	PVMV234444	SRSS231196	TEST121211			Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	CONT110906	2023				Select Date	Select Slot

8. Select the **Date** from the drop-down.

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	GLVP123456	3445		Yes		Select Date	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	PICK7896785					2023-Sep-25 2023-Sep-26	Select Slot

9. Select the **Slot** from the drop-down.

0 Selected		Add Email	Convert To Dual	Select Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	GLVP123456	3445		Yes		2023-Sep-26	Select Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	PICK7896785					Select Date	00:00 - 01:00 01:00 - 02:00 02:00 - 03:00 03:00 - 04:00 04:00 - 05:00 05:00 - 06:00 06:00 - 07:00 07:00 - 08:00 08:00 - 09:00
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	SCAC1234567					Select Date	
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	CONT202001	2023	DROP202301	Yes		Select Date	
<input type="checkbox"/>		3PL Global - SANTA ANA	Dual	SHIP212301	2023	CONT898989	Yes		Select Date	



Note:



- Once the users select a **Slot**, **Appointment Ready** status will change in to **Confirmed**.

0 Selected	Add Email	Convert To Dual	Select	Search...						
<input type="checkbox"/>	Action	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Date	Slot
<input type="checkbox"/>		3PL Global - SANTA ANA	Pickup	GLVPI23456	3445		Confirmed		2023-Sep-26	05:00 - 06:00

- The appointment **Date** and Time **Slot** drop-down will show only the dates with available slots, within the configured range of advance appointment limit.
- Users will get email notification when the Appt. Ready status changes from:
 - Yes to No
 - No to Yes
- Users can view the status as **Confirmed** or **Action Required** on the **Appt. Ready** column

An **Appointment** is created.

1.6. How to Add an Email to an Appointment

Users can Add Email to a single or multiple appointment and are enabled with greater flexibility and convenience, allowing you to easily manage email notifications for multiple containers at once.

Perform the following steps to **Add Email** to an Appointment:

- Select the **check box** next to the Location column for any appointment of choice.

1 Selected

Add Email

Select

Search...

<input type="checkbox"/>	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Dual	Date	Slot	Action
<input checked="" type="checkbox"/>	NS - Rossville	Pickup	PICK300399	1234		Yes		<input type="checkbox"/>	<div>Select Date</div>	<div>Select Slot</div>	
<input type="checkbox"/>	NS - Rossville	Drop			NYKU581305	Yes		<input type="checkbox"/>	<div>Select Date</div>	<div>Select Slot</div>	
<input type="checkbox"/>	BARE TEST	Pickup	WWW34444	5000		Yes		<input type="checkbox"/>	<div>Select Date</div>	<div>Select Slot</div>	



Note: Users can select a single **check box** or multiple **check boxes** next to the location column and provide multiple email entries. If only one container is selected and the **Add Email** button is clicked, the box will pre-populate with



the emails already assigned to that container and in case of multiple entries are selected, the email entered will apply to all selected containers.

2. Click **Add Email**.

1 Selected Add Email											Select ▼ Search...
<input type="checkbox"/>	Location	Type	Pickup Container#	Pickup #	Drop Container #	Appt. Ready	Last Free Date	Dual	Date	Slot	Action
<input checked="" type="checkbox"/>	NS - Rossville	Pickup	PICK300399	1234		✓ Yes		<input type="checkbox"/>	Select Date ▼	Select Slot ▼	
<input type="checkbox"/>	NS - Rossville	Drop			NYKU581305	✓ Yes		<input type="checkbox"/>	Select Date ▼	Select Slot ▼	
<input type="checkbox"/>	BARE TEST	Pickup	WWW34444	5000		✓ Yes		<input type="checkbox"/>	Select Date ▼	Select Slot ▼	

The **Add Email** pop-up window is displayed.

Appointments

To be scheduled: 9 Ready, 0 At risk, 161 All | Scheduled: 3 Todays, 46 At risk, 648 All

1 Selected **Add Email**

Add Email

Please add comma separated email addresses:

Cancel Save

3. Specify the email addresses in the field.

Appointments

To be scheduled: 9 Ready, 0 At risk, 161 All | Scheduled: 3 Todays, 46 At risk, 648 All

1 Selected **Add Email**

Add Email

Please add comma separated email addresses:

Cancel Save

4. Click **Save**.

Add Email

×

Please add comma separated email addresses:

nssuperadmin@yopmail.com, bhagyacustomer@yopmail.com

Cancel

Save



Note: Click **Cancel** to go back to the **My Appointments** page.

The email addresses are successfully added.

BLUME

Dashboard

My Appointments

9

Ready

0

At risk

161

All

3

Today's

46

At risk

648

All

0 Selected

Add Email

NS - Rossville

Pickup

PICK300399

1234

✓ Yes

Select Date

Select Slot

NS - Rossville

Drop

NYKU581305

✓ Yes

Select Date

Select Slot

BARE TEST

Pickup

WWWW34444

5000

✓ Yes

Select Date

Select Slot

1.7. How to Cancel an Appointment

Users can cancel appointments that have a future date in the **Appointments** page.

Perform the following steps to cancel an appointment:

1. Navigate to the **My Appointments** page.



2. Click on the **All** tab in the **Scheduled** section.

Appointments												+ Add Container
To be Scheduled						Scheduled						
Ready	981	At Risk	0	All	1.5k	Todays	1	At Risk	641	All	4.4k	
0/4427 Selected						Share Appointment		Cancel	Convert To Dual		Select Search...	
<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			CONT670706	2023-Dec-07	13:00 - 14:00			Action Required	Waybill is already active for unit to be picked up.	
<input type="checkbox"/>	Butler Intermodal Terminal	Drop			To be updated	2023-Nov-26	02:00 - 03:00			Cancelled	Cancelled - Container# not updated	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP908787	2023-Dec-05	12:00 - 13:00			Confirmed		

3. Tick the required **Appointment** check-box to **Cancel**.

Appointments												+ Add Container
To be Scheduled						Scheduled						
Ready	981	At Risk	0	All	1.5k	Todays	1	At Risk	641	All	4.4k	
0/4427 Selected						Share Appointment		Cancel	Convert To Dual		Select Search...	
<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments	
<input checked="" type="checkbox"/>	3PL Global - SANTA ANA	Drop			CONT670706	2023-Dec-07	13:00 - 14:00			Action Required	Waybill is already active for unit to be picked up.	
<input type="checkbox"/>	Butler Intermodal Terminal	Drop			To be updated	2023-Nov-26	02:00 - 03:00			Cancelled	Cancelled - Container# not updated	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP908787	2023-Dec-05	12:00 - 13:00			Confirmed		



Note:

- Upcoming appointments having **Confirmed** and **Confirmed-Tentative** statuses can only be cancelled. Users can select multiple appointments together to cancel.

4. Click on the **Cancel** button.

Appointments												+ Add Container
To be Scheduled						Scheduled						
Ready	981	At Risk	0	All	1.5k	Todays	1	At Risk	641	All	4.4k	
1/4427 Selected						Share Appointment		Cancel	Convert To Dual		Select Search...	
<input checked="" type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments	
<input checked="" type="checkbox"/>	3PL Global - SANTA ANA	Drop			CONT670706	2023-Dec-08	10:00 - 11:00			Action Required	Waybill is already active for unit to be picked up.	
<input type="checkbox"/>	Butler Intermodal Terminal	Drop			To be updated	2023-Nov-26	02:00 - 03:00			Cancelled	Cancelled - Container# not updated	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP908787	2023-Dec-05	12:00 - 13:00			Confirmed		

5. Enter the reason for cancellation in the **Cancel Appointment** pop-up window.

Cancel Appointment

Do you want to cancel the selected appointments? If yes, please provide the reason.

Please provide a reason for cancellation.

Submit

6. Click **Save**.

Cancel Appointment

Do you want to cancel the selected appointments? If yes, please provide the reason.

Please provide a reason for cancellation.

Submit

The **Appointment** is cancelled.

1.8. How to Edit an Appointment

Blume's **Appointment Management System** enables the users to edit **Appointments**.

Perform the following steps to edit an **Appointment**:

1. Navigate to the Appointments under the **Scheduled** tab.

Appointments

To be Scheduled

Ready173At Risk0All238

Scheduled

Today's4At Risk560All3k

0 Selected

Share Appointment

Cancel

Convert To Dual

SelectSearch...

Location

Appointment Type

Pickup container #

Pickup #

Drop container #

Appointment date

Time

Actions

Last Free Date

Status

Comments

3PL Global - SANTA ANA

Pickup

GLVP123456

3445

2023-Sep-26

05:00 - 06:00

Confirmed

3PL Global - SANTA ANA

Pickup

UNIT260001

2023

2023-Sep-26

03:00 - 04:00

Completed

3PL Global - SANTA ANA

Drop

DROP117104

2023-Sep-25

09:00 - 10:00

Missed

2. Click the **Edit** icon to edit the specific choice of appointment under the **Action** column.

Appointments

To be Scheduled

Ready 173At Risk 0All 238

Scheduled

Todays 4At Risk 560All 3k

0 Selected

Share Appointment

Cancel



Convert To Dual

Select











Search...

<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	GLVP123456	3445		2023-Sep-26	05:00 - 06:00			Confirmed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	UNIT260001	2023		2023-Sep-26	03:00 - 04:00			Completed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROPI17104	2023-Sep-25	09:00 - 10:00			Missed	

3. Select the **Appointment date** from the drop-down.

0 Selected				Share Appointment		Cancel		Convert To Dual			
<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	GLVP123456	3445		2023-Sep-26	05:00 - 06:00			Confirmed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	UNIT260001	2023		2023-Sep-26	03:00 - 04:00			Completed	

4. Select the **Time** slot from the drop-down.

0 Selected				Share Appointment		Cancel		Convert To Dual			
<input type="checkbox"/>	Appointment #	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Cancelled By	Cancelled Date
<input type="checkbox"/>	NIRT-SP230926uIMGz	3PL Global - SANTA ANA	Pickup	GLVP123456	3445		2023-Sep-26	05:00 - 06:00			
<input type="checkbox"/>	NIRT-SP230926b4ouL6	3PL Global - SANTA ANA	Pickup	UNIT260001	2023		2023-Sep-26	00:00 - 01:00			
<input type="checkbox"/>	NIRT-SD230925T294qV	3PL Global - SANTA ANA	Drop			DROPI17104	2023-Sep-25	01:00 - 02:00			
<input type="checkbox"/>	NIRT-SP230925X4Trgb	3PL Global - SANTA ANA	Pickup	CONT898989	2023		2023-Sep-25	02:00 - 03:00			
<input type="checkbox"/>	NIRT-SP230925UMS0xb	3PL Global - SANTA ANA	Pickup	CGUN250303	1234		2023-Sep-25	03:00 - 04:00			
<input type="checkbox"/>								04:00 - 05:00			
<input type="checkbox"/>								05:00 - 06:00			
<input type="checkbox"/>								06:00 - 07:00			
<input type="checkbox"/>								07:00 - 08:00			
<input type="checkbox"/>								08:00 - 09:00			



Note: Users can **Reschedule** appointments with the status Missed or Cancelled and a new entry with a different appointment ID will be created, while the old entry will still remain visible on the **My Appointments** page.

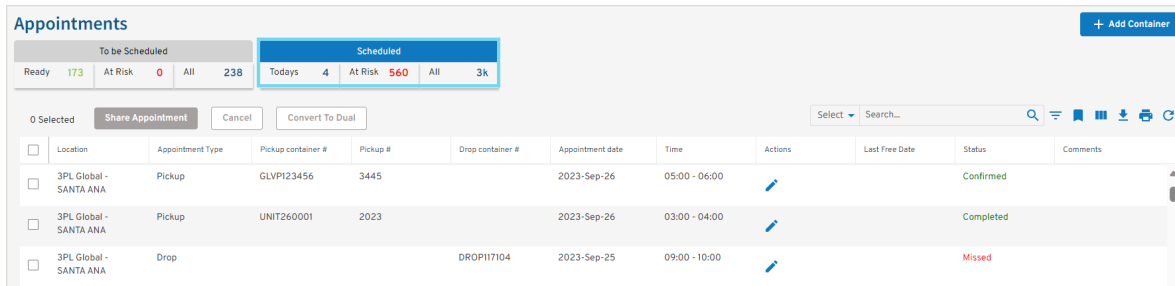
An **Appointment** is edited. Additionally, users can share the appointment details by clicking on the **Share Appointment** button.

1.9. How to Share Appointment Details

Users can share the specific appointment details of choice with the individuals or drivers through email.

Perform the following steps to share the appointment details:

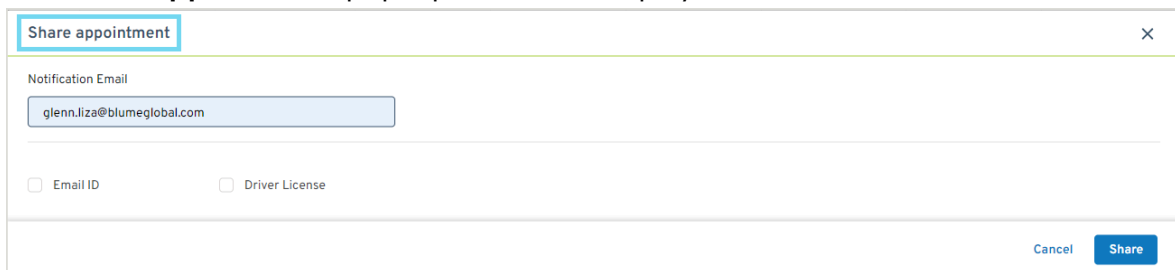
1. Navigate to the Appointments under the **Scheduled** tab.



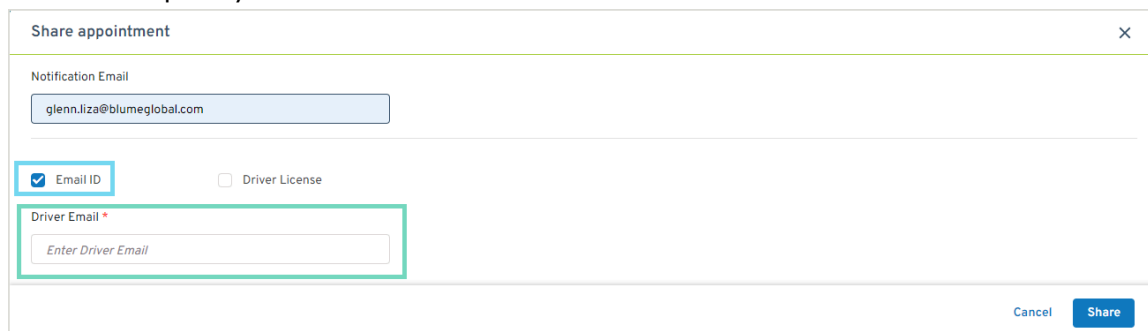
2. Click the **check box** next to the specific appointment of choice.



The **Share appointment** pop-up window is displayed.



- Click on the **Email ID** check box to share the appointment details through email id. Users can specify the **Driver Email**.



- Click the **Driver License** check box to share the appointment details. Specify the details for **Driver License, Driver Country, Driver state**.

Share appointment

Notification Email
glenn.liza@blumeglobal.com

☐ Email ID
☒ Driver License

Driver Name
Enter driver's name

Driver License *
Enter Driver License

Driver country *
United States

Driver state *
Select One

SCAC
NILE

Cancel
Share



Note: The fields marked with * are mandatory

3. Click **Share** to share the appointment details.

Share appointment

Notification Email
glenn.liza@blumeglobal.com

☐ Email ID
☒ Driver License

Driver Name
Enter driver's name

Driver License *
KL2820210002448

Driver country *
India

Driver state *
Kerala

SCAC
NILE

Cancel
Share



Note: Click **Cancel** to go back to the **My Appointments** page.

The appointment details are successfully shared.

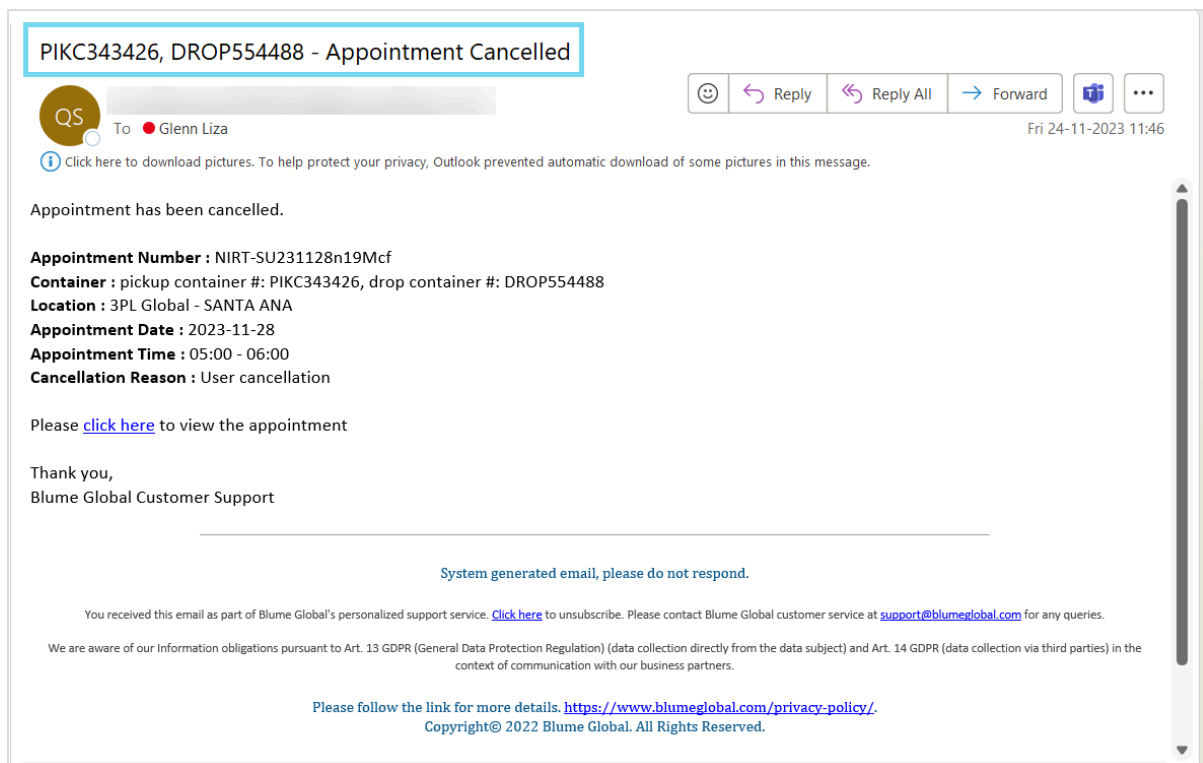
1.10. How will the System notify you when there are changes to your Appointments or Containers

Appointment Management System trigger Email notifications to the users on multiple occasions.

Following are the use cases where the Appointment Management System trigger Email notifications.

- The container added to the watch list becomes available for Pickup
- Appointment Successfully Booked

- The appointment Cancelled from Terminal
- Broadcast Message
- Message from terminal to a specific Appointment
- Missed Appointment
- Notification one hour before an appointment is auto cancelled – Drop container not updated
- Notification one hour before an appointment is auto cancelled – Drop off not ready
- Notification one hour before an appointment is auto cancelled – Storage not paid
- Cancelled by end user/customer
- Auto Cancellation
 - 1. Container Not updated
 - 2. Drop not ready
 - 3. Storage not paid
 - 4. Pickup not ready



1.11. How to add a Motor Carrier to your Appointment

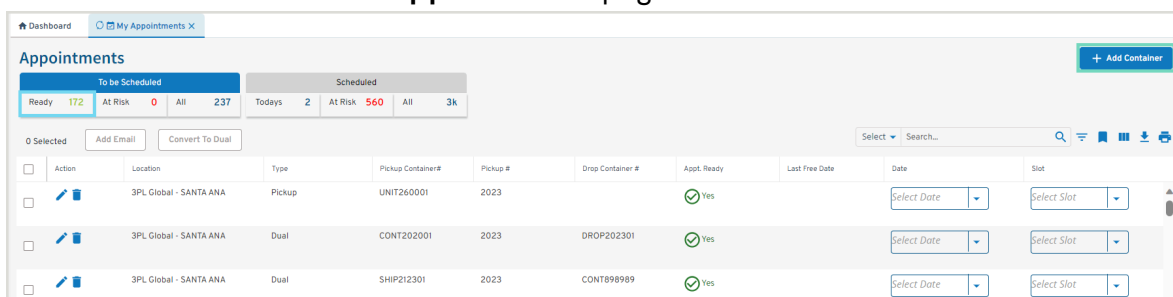
The users can add a **Motor Carrier** to the watch list.

Perform the following steps to add a Container to the watch list.

1. Navigate to **Appointment SchedulingMy Appointments** on the **Blume Appointment Management System**.



2. Click **Add Container** on the **Appointments** page.





Note: Three parameters will be displayed once you click on the **Add Container**. By default, **Select Location**, and **Select Appointment Type** will be selected. The users can change **Select Location** and **Select Appointment Type** from the drop-down.

3. Select the **Location** and the **Appointment Type**.

4. Specify the Container Number.



Note: Users can add up to 20 container numbers. Users can either copy and paste the container numbers, or type the number in the field.

5. Click **Submit**.



Note: Users can add a **Motor Carrier** from the All Appointments section , using the edit option.

Perform the following steps to add a **Motor Carrier** from the **Appointments** section.

6. Select the **Appointment** from the list view that you want to attach a motor carrier.

Appointments + Add Container

To be Scheduled				Scheduled							
Ready	At Risk	All		Today's	At Risk	All					
173	0	238		4	560	3k					

0 Selected Share Appointment Cancel Convert To Dual Select Search... Q Filter Print Refresh

<input type="checkbox"/>	Location	Appointment Type	Pickup container #	Pickup #	Drop container #	Appointment date	Time	Actions	Last Free Date	Status	Comments
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	GLVP123456	3445		2023-Sep-26	05:00 - 06:00			Confirmed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Pickup	UNIT260001	2023		2023-Sep-26	03:00 - 04:00			Completed	
<input type="checkbox"/>	3PL Global - SANTA ANA	Drop			DROP117104	2023-Sep-25	09:00 - 10:00			Missed	

7. Click **Edit**.

To be scheduled		Scheduled	
Ready	At risk	Todays	At risk
26	0	4	45
191	669		

Appointment #	Location	Appointment Type	Dual	Pickup container #	Pickup #	Drop container #	Appointment Date	Time	Cancelled By	Cancelled Date	Status	Comments
AusteID230404IMCIG	NS - Atlanta, GA - Austell	Drop				SMJH455	2023-Apr-04	03:00 - 06:00			Confirmed	
NIRT-SD230403v425Z	3PL Global - SANTA ANA	Drop				To be updated	2023-Apr-03	12:00 - 13:00	SYSTEM	2023-Apr-03 11:40	Cancelled	Aut Con
NIRT-SU230403V3b5JR	3PL Global - SANTA ANA	Dual		PICK435001	2023	DROP789009	2023-Apr-04	00:00 - 01:00			Confirmed	
RossviD230406RBEJ2	NS - Rossville	Drop				DROP883402	2023-Apr-07	00:00 - 00:30			Confirmed	

8. On the pop-up window displayed, specify the Container number, Driver Name, Driver Licence, Driver Country, Driver State, SCAC, and the Notification Email.

8 Ready

0 At risk

158 All

3 Todays

43 At risk

645 All

1 Selected

Edit

Cancel

Reschedule

Appointment #

Location

Appointment Type

Dual

Pickup container #

Pickup #

Drop container #

Appointment Date

Time

Cancelled By

Cancelled Date

Status

Comments

Driver name

Enter driver's name

Driver License

Enter Driver License

Driver Country

United States

Driver State

Select one

SCAC

Notification Email

nssuperadmin@yopmail.com

Cancel

Save

9. Click **Save**.

8 Ready

0 At risk

158 All

3 Todays

43 At risk

645 All

1 Selected

Edit

Cancel

Reschedule

Appointment #

Location

Appointment Type

Dual

Pickup container #

Pickup #

Drop container #

Appointment Date

Time

Cancelled By

Cancelled Date

Status

Comments

Driver name

Enter driver's name

Driver License

Enter Driver License

Driver Country

United States

Driver State

Select one

SCAC

Notification Email

nssuperadmin@yopmail.com

Cancel

Save

The **Motor Carrier** is added to the **Appointment**.

1.12. Advance Filters

The **Advance Filter** icon on the **Appointments** page enables you to filter the **Appointments** details. You can filter **Appointments** details based on **Appointment**,

Location, Appointment Type, Container, Pickup, Appointment Slot, Last Free Date, and Status.

Perform the following steps to filter the **Appointments**:

1. Navigate to the **Appointments** page.



2. Click the **Advance Filters** icon .

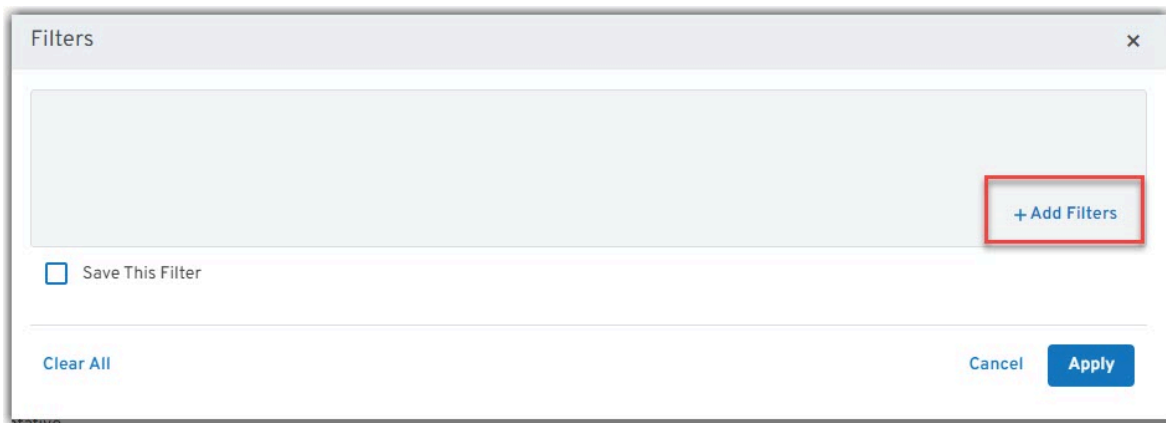
The screenshot shows the 'Appointments' page. At the top, there's a 'Dashboard' tab and a 'My Appointments X' tab. Below this, there's a summary section with 'To be scheduled' (26 Ready, 0 At risk, 191 All) and 'Scheduled' (4 Todays, 45 At risk, 669 All). A table of appointments is displayed below. A search bar and a filter icon (three horizontal lines) are highlighted in the top right corner of the table.

Appointment #	Location	Appointment Type	Dual	Pickup container #	Pickup #	Drop container #	Appointment Date	Time	Cancelled By	Cancelled Date	Status	Com
AustelID230404IMIGIG	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			SMJH455	2023-Apr-04	03:00 - 06:00			Confirmed	
NIRT-SD230403eVd25Z	3PL Global - SANTA ANA	Drop	<input type="checkbox"/>			To be updated	2023-Apr-03	12:00 - 13:00	SYSTEM	2023-Apr-03 11:40	Cancelled	Aut Con
NIRT-SU230403V3b5JR	3PL Global - SANTA ANA	Dual	<input checked="" type="checkbox"/>	PICK435001	2023	DROP789009	2023-Apr-04	00:00 - 01:00			Confirmed	
RossviD230406R1BEJ2	NS - Rossville	Drop	<input type="checkbox"/>			DROP883402	2023-Apr-07	00:00 - 00:30			Confirmed	

3. Click **+ Create New Filter** on the Filters menu displayed.

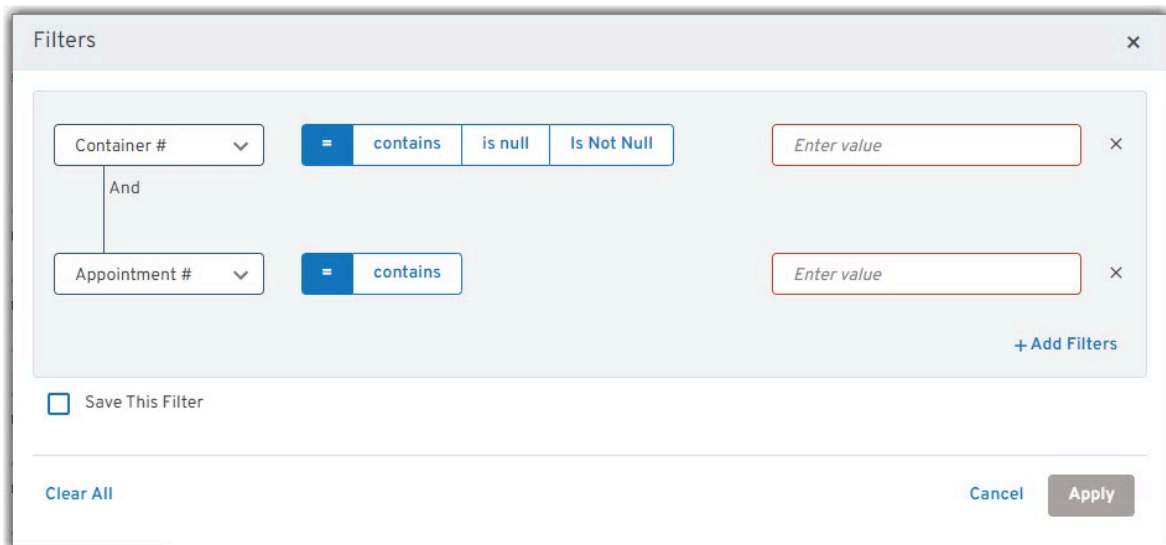
The screenshot shows the 'Appointments' page with the 'Filters' menu open. The menu options are: '+ Create New Filter', 'Save As New Filter', 'Manage Filters', 'Default (No Filter)', and 'Pickup'. The '+ Create New Filter' option is highlighted with a red box.

4. Click **+ Add Filters** on the Filter pop-up page displayed.



The screenshot shows a 'Filters' dialog box with a close button (X) in the top right corner. The main area is empty, with a red rectangular box highlighting a '+ Add Filters' button in the bottom right corner. Below the main area, there is a checkbox labeled 'Save This Filter'. At the bottom, there are three buttons: 'Clear All', 'Cancel', and 'Apply'.

5. Select the applicable columns and set their respective details as per your requirement to filter the Appointment details.



The screenshot shows the 'Filters' dialog box with two filters applied. The first filter is 'Container #' with a dropdown arrow, followed by a blue '=' button, a 'contains' button, and an 'is null' button. To the right is a text input field with the placeholder 'Enter value' and a close button (X). The second filter is 'Appointment #' with a dropdown arrow, followed by a blue '=' button and a 'contains' button. To the right is another text input field with the placeholder 'Enter value' and a close button (X). The filters are connected by an 'And' connector. A '+ Add Filters' button is in the bottom right of the filter area. Below the filter area is a checkbox labeled 'Save This Filter'. At the bottom, there are three buttons: 'Clear All', 'Cancel', and 'Apply'.

6. Enable the **Save this Filter** option and specify the filter name under the **Filter Name** field to save the filter in the list of filters.

Filters

Container # = contains is null Is Not Null Enter value

And

Appointment # = contains Enter value

+ Add Filters

☒ Save This Filter

Filter Name*

Private Public

Clear All Cancel Save & Apply



Note: To control visibility of the Filter, toggle either the Private or Public options.

7. Click **Save & Apply** to apply the filter to the **Appointments** list page.

Filters

Container # = contains is null Is Not Null 859

And

Appointment # = contains 867

+ Add Filters

☒ Save This Filter

Filter Name*

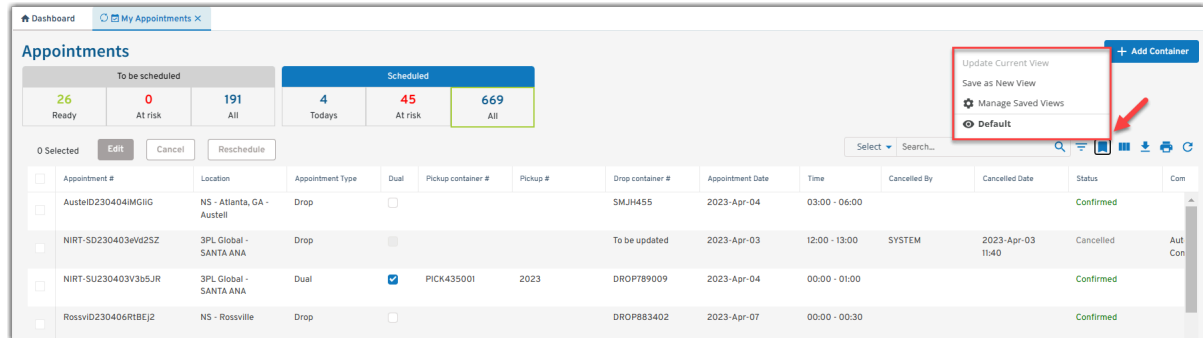
Test_Filter1 Private Public

Clear All Cancel Save & Apply

The filter is successfully created and is now available on the list of filters. Users can view the new filter under **Advance Filters**.

1.13. Managing Views

The **Managing Views** enables you to manage multiple dashboard views.



The following options are available for **View Management**.

- **Update Current View:** Updates the current view from the recently saved view.
- **Save as New View:** Enables you to save the **Current View**. Specify a name for the view in the **New View Name** field and click **Save**.
- **Manage Saved Views:** Enables you to add or remove the saved views and click **Save** to update the changes.
- **Default:** Sets the current view to the default view.

1.14. Managing Columns

This option allows you to customize the columns that are displayed on the **Appointments** page according to its preferences.

Click **Manage Columns** icon to manage columns. You can add or remove the columns by selecting the desired column check box. For example, Appointment, Location, Appointment Type, Container, Pickup, Appointment Slot and so on. and click **Apply**.

The screenshot shows the 'Appointments' dashboard with a table of appointments. A 'Manage Columns' dialog box is open, allowing users to select which columns to display on the grid. The dialog includes a search bar, a list of columns with checkboxes, and buttons for 'Reset', 'Cancel', and 'Apply'.

To be scheduled		Scheduled	
Ready	At risk	Today's	At risk
26	0	3	47
All	All	All	All

Appointment #	Location	Appointment Type	Dual	Pickup container #	Pickup #	Drop container #	Appointment Date	Time	Last Free Date
AusteID2304082hCkyl	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			To be updated	2023-Apr-08	09:00 - 12:00	
NIRT-SUZ30403V3b5JR	3PL Global - SANTA ANA	Dual	<input checked="" type="checkbox"/>	PICK435001	2023	DROP789009	2023-Apr-10	07:00 - 08:00	
RossviP230407mu9zH0	NS - Rossville	Pickup	<input type="checkbox"/>	CONT442301	1234		2023-Apr-07	02:00 - 02:30	
RossviD230406RtBEJ2	NS - Rossville	Drop	<input type="checkbox"/>			DROP883402	2023-Apr-07	00:00 - 00:30	
AusteID230404IMGIG	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			SMJH455	2023-Apr-04	03:00 - 06:00	
NIRT-SD230403eVd2SZ	3PL Global - SANTA ANA	Drop	<input type="checkbox"/>			To be updated	2023-Apr-03	12:00 - 13:00	
RossviP230406rOPSJ5	NS - Rossville	Pickup	<input type="checkbox"/>	PICK883401	1234		2023-Apr-06	03:00 - 03:30	
RossviP230406Y5ICKt	NS - Rossville	Pickup	<input type="checkbox"/>	PICK883402	1234		2023-Apr-06	02:00 - 02:30	
NIRT-SUZ304034L7Yuv	3PL Global -	Dual	<input checked="" type="checkbox"/>	PICK674001	1234	DROP789011	2023-Apr-03	12:00 - 13:00	



Note: Some of the columns can be sorted in ascending and descending orders by clicking the column name.

1.15. Downloading Appointments

This option enables you to download all the available information on the dashboard in excel format.

Users can click the **Download** icon to download **Appointment** details.

The screenshot shows the 'Appointments' dashboard with a table of appointments. A download icon (a square with a downward arrow) is highlighted in the top right corner of the table, indicating the option to download the data in Excel format.

Appointment #	Location	Appointment Type	Dual	Pickup container #	Pickup #	Drop container #	Appointment Date	Time	Last Free Date	Status	Comments
AusteID2304082hCkyl	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			To be updated	2023-Apr-08	09:00 - 12:00		Confirmed-Tentative	
NIRT-SUZ30403V3b5JR	3PL Global - SANTA ANA	Dual	<input checked="" type="checkbox"/>	PICK435001	2023	DROP789009	2023-Apr-10	07:00 - 08:00		Confirmed	
RossviP230407mu9zH0	NS - Rossville	Pickup	<input type="checkbox"/>	CONT442301	1234		2023-Apr-07	02:00 - 02:30		Confirmed	
RossviD230406RtBEJ2	NS - Rossville	Drop	<input type="checkbox"/>			DROP883402	2023-Apr-07	00:00 - 00:30		Confirmed	
AusteID230404IMGIG	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			SMJH455	2023-Apr-04	03:00 - 06:00		Confirmed	

1.16. Printing Appointments

This option enables you to print all the available information on the **Appointments** Page.

Users can click the **Print** icon to print the **Appointment** details.

Dashboard

My Appointments

Appointments

To be scheduled

26
Ready

0
At risk

191
All

Scheduled

3
Today

47
At risk

671
All

0 Selected

Edit

Cancel

Reschedule

Select

Search...

	Appointment #	Location	Appointment Type	Dual	Pickup container #	Pickup #	Drop container #	Appointment Date	Time	Last Free Date	Status	Comments
<input type="checkbox"/>	AustelID2304082hCkyl	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			To be updated	2023-Apr-08	09:00 - 12:00		Confirmed-Tentative	
<input type="checkbox"/>	NIRT-SUZ30403V3b5JR	3PL Global - SANTA ANA	Dual	<input checked="" type="checkbox"/>	PICK435001	2023	DROP789009	2023-Apr-10	07:00 - 08:00		Confirmed	
<input type="checkbox"/>	RossviP230407mu9zH0	NS - Rossville	Pickup	<input type="checkbox"/>	CONT442301	1234		2023-Apr-07	02:00 - 02:30		Confirmed	
<input type="checkbox"/>	RossviD230406R1BEJ2	NS - Rossville	Drop	<input type="checkbox"/>			DROP883402	2023-Apr-07	00:00 - 00:30		Confirmed	
<input type="checkbox"/>	AustelID230404iMGiG	NS - Atlanta, GA - Austell	Drop	<input type="checkbox"/>			SMJH455	2023-Apr-04	03:00 - 06:00		Confirmed	

2. Configuring Appointments

Users can configure their appointments according to enabled locations and book appointments in bulk based on user-defined parameters.

On the Appointment Configuration page, users can view the following:

- Configuring Location (*on page 28*)
- Automating Appointments (*on page 29*)



Appointment Configuration					
Location Configuration		Auto Appointments			
Location	City	State	Country	Status	Default Location
Butler Intermodal Terminal	Shell Rock	Iowa	United States	Enabled	<input checked="" type="radio"/>
#1 CONV STORE	Baxley	Georgia	United States	Disabled	<input type="radio"/>
#1 CONV STORE	Baxley	Georgia	United States	Disabled	<input type="radio"/>
#154 PETSMART EAST MESA	Mesa	Arizona	United States	Disabled	<input type="radio"/>
#1 LATIN STORE	Virginia Beach	Virginia	United States	Disabled	<input type="radio"/>
#1 SUPER MARKET	Bakersfield	California	United States	Disabled	<input type="radio"/>

2.1. Configuring Location

Users can configure their locations for appointments by enabling or disabling specific locations to view a comprehensive list of all locations where appointment scheduling is supported.

Perform the following steps to configure location:

1. Navigate to the **Appointment Scheduling** on the left navigation menu.



2. Click on **Appointment Configuration**.




The **Appointment Configuration** page is displayed.



Location	City	State	Country	Status	Default Location
Butler Intermodal Terminal	Shell Rock	Iowa	United States	<input checked="" type="radio"/> Enabled	<input checked="" type="radio"/>
# 1 CONV STORE	Baxley	Georgia	United States	<input type="radio"/> Disabled	<input type="radio"/>
# 1 CONV STORE	Baxley	Georgia	United States	<input type="radio"/> Disabled	<input type="radio"/>
# 154 PETSMART EAST MESA	Mesa	Arizona	United States	<input type="radio"/> Disabled	<input type="radio"/>
#1 LATIN STORE	Virginia Beach	Virginia	United States	<input type="radio"/> Disabled	<input type="radio"/>

3. Click on the **Status** field to **Enable** or **Disable** locations.




Location	City	State	Country	Status	Default Location
Butler Intermodal Terminal	Shell Rock	Iowa	United States	<input checked="" type="radio"/> Enabled	<input checked="" type="radio"/>
# 1 CONV STORE	Baxley	Georgia	United States	<input type="radio"/> Disabled	<input type="radio"/>
# 1 CONV STORE	Baxley	Georgia	United States	<input type="radio"/> Disabled	<input type="radio"/>
# 154 PETSMART EAST MESA	Mesa	Arizona	United States	<input type="radio"/> Disabled	<input type="radio"/>
#1 LATIN STORE	Virginia Beach	Virginia	United States	<input type="radio"/> Disabled	<input type="radio"/>



Note: When a terminal is disabled, it will no longer appear in users' profiles for adding containers.

4. Click on the **radio button** on the **Default Location** field to enable a specific location to be default.



Location	City	State	Country	Status	Default Location
Butler Intermodal Terminal	Shell Rock	Iowa	United States	<input checked="" type="radio"/> Enabled	<input checked="" type="radio"/>
# 1 CONV STORE	Baxley	Georgia	United States	<input type="radio"/> Disabled	<input type="radio"/>
# 1 CONV STORE	Baxley	Georgia	United States	<input type="radio"/> Disabled	<input type="radio"/>
# 154 PETSMART EAST MESA	Mesa	Arizona	United States	<input type="radio"/> Disabled	<input type="radio"/>
#1 LATIN STORE	Virginia Beach	Virginia	United States	<input type="radio"/> Disabled	<input type="radio"/>



Note: When a default location is defined, the location selection option will be pre-populated with the default value.

The Locations are configured making it easier for users to quickly proceed with their appointments.

2.2. Automating Appointments

Users can automatically book appointments in bulk based on user-defined parameters.

Perform the following steps to automate appointments:

1. Navigate to **Appointment Scheduling** on the left navigation menu.



2. Click on the **Appointment Configuration**.



The **Appointment Configuration** page is displayed.

A screenshot of the 'Appointment Configuration' page. The page has a header with 'Appointment Configuration' and a sub-header with 'Location Configuration' and 'Auto Appointments'. Below the sub-header is a table with columns: Location, City, State, Country, Status, and Default Location. The table contains five rows of location data.

Location	City	State	Country	Status	Default Location
Butler Intermodal Terminal	Shell Rock	Iowa	United States	Enabled	<input checked="" type="radio"/>
#1 CONV STORE	Baxley	Georgia	United States	Disabled	<input type="radio"/>
#1 CONV STORE	Baxley	Georgia	United States	Disabled	<input type="radio"/>
#154 PETSMART EAST MESA	Mesa	Arizona	United States	Disabled	<input type="radio"/>
#11 LATIN STORE	Virginia Beach	Virginia	United States	Disabled	<input type="radio"/>

3. Click on the **Auto Appointments**.

A screenshot of the 'Appointment Configuration' page. The page has a header with 'Appointment Configuration' and a sub-header with 'Location Configuration' and 'Auto Appointments'. The 'Auto Appointments' tab is selected and highlighted with a red box. Below the sub-header is a form with an 'Office' dropdown menu set to 'Nile Logistics Services -LAX'. Below the form is a table with columns: Location, Automatic Rules, and Action. The table contains four rows of location data.

Location	Automatic Rules	Action
NS - Rutherford	+ Add Item	
NS - Atlanta, GA - Austell	Allow automated appointments after last free date	
#31 DINO PASQUA	+ Add Item	
#11 COLLADO	Not more than 3 appointments per slot Minimum 14 hours out appointment allowed No Automated appointment after Last free date	



Note: The **Office** is automatically populated. Users can select their respective **location** as well.

4. Click on **+ Add item** under the Automatic Rules field.

Location Configuration		Auto Appointments
Office Nile Logistics Services -LAX		
Location NS - Rutherford	Automatic Rules + Add Item	Action

The **Automated Appointments Rules** pop-up window is displayed.

Automated Appointment Rules

×

Dont make automated bookings after last free date
☐ No

Dont book more than appointments in same slot

Book for minimum hours out

Reset

Cancel

Save

- Click on the toggle button to enable the Dont make automated bookings after last free date rule.

Automated Appointment Rules

×

Dont make automated bookings after last free date
☒ No

Dont book more than appointments in same slot

Book for minimum hours out

Reset

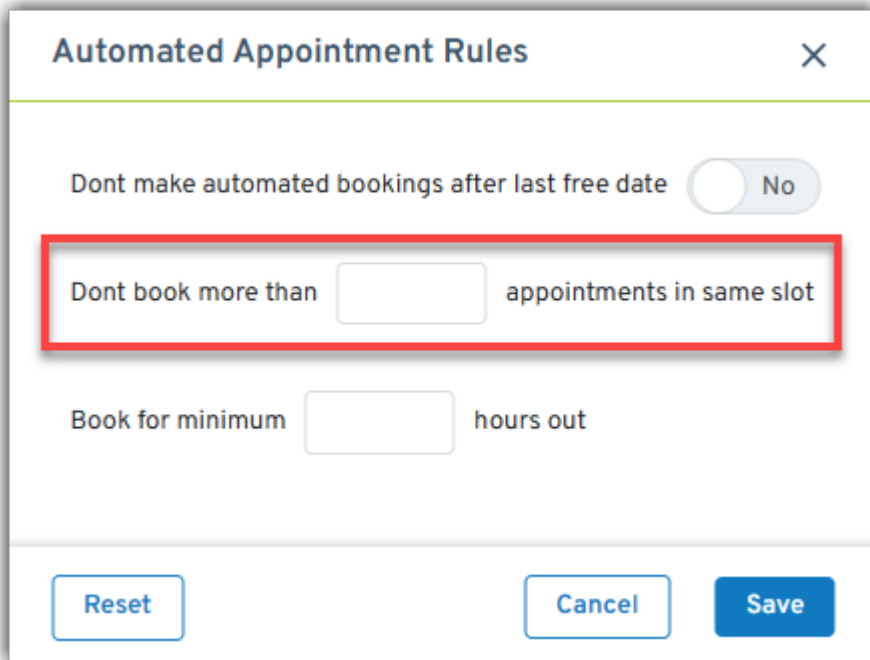
Cancel

Save



Note: Users can choose if they would want to enable automated bookings after last free date or not. By default, bookings will be made on the first available slot satisfied by the rules

6. Specify the number of appointments for Dont book more than X appointmts in same slot rule.



Automated Appointment Rules [X]

Dont make automated bookings after last free date ☐ No

Dont book more than appointments in same slot

Book for minimum hours out



Note: Users can choose how many appointments they want in the same slot. For ex- If a user has 3 containers and there are multiple appointments available in a single slot then if the value of X = 1, then user will only be given 1 appointment in the slot.

7. Specify the number of hours for the Book for minimum X hours out rule.

Automated Appointment Rules

Dont make automated bookings after last free date

☐ No

Dont book more than

appointments in same slot

Book for minimum

hours out

Reset

Cancel

Save



Note: Users can define a minimum lead time before appointments are created, such as 12 or 24 hours in advance

8. Click **Save** to save the details.

Automated Appointment Rules

Dont make automated bookings after last free date

☐ No

Dont book more than

appointments in same slot

Book for minimum

hours out

Reset

Cancel

Save




Note:




- Click **Cancel** to go back to the **Auto Appointments** tab.
- Click **Reset** to reset the details on the **Automated Appointment Rules** pop-up window.

9. Click **Edit** icon to edit the saved rules.

Location Configuration		Auto Appointments
Office Nile Logistics Services -LAX		
Location	Automatic Rules	Action
NS - Rutherford	+ Add Item	
NS - Atlanta, GA - Austell	Allow automated appointments after last free date	

10. Click the **Delete** icon to delete the Automated Appointment Rules for a location.

Location Configuration		Auto Appointments
Office Nile Logistics Services -LAX		
Location	Automatic Rules	Action
NS - Rutherford	+ Add Item	
NS - Atlanta, GA - Austell	Allow automated appointments after last free date	

The **Delete Automated Appointment Rules** pop-up window is displayed.

Delete Automated Appointment Rules

×

Auto appointment rules will be deleted for **#11 COLLADO** location for the office **Nile Logistics Services -LAX**. Are you sure to proceed?

Cancel

Delete

11. Click **Delete** to delete the Automated Appointment Rules for a specific location.

Delete Automated Appointment Rules

×

Auto appointment rules will be deleted for **#11 COLLADO** location for the office **Nile Logistics Services -LAX**. Are you sure to proceed?

Cancel

Delete



Note: Click **Cancel** to go back to the **Auto Appointments** tab.

The appointments are automated for a specific terminal location.

3. Video Tutorials

The video tutorials listed in this page provides step by step instructions on how to perform numerous operations on the Appointment Scheduling platform.

Topic	Description	Video Link
Introduction to Appointment and Scheduling	This video tutorial contains a high level overview to the Appointment and Scheduling solution. The features and key advantages of the solution are discussed in this training.	Watch
Introduction to Pick-up and Delivery	This video provides an overview to the Appointment Scheduling solution. Along with a walk through of the key features and benefits of using the application.	Watch
Booking An Appointment	This video tutorial will provide step by step instructions to booking an Appointment	Watch
Adding a Motor Carrier	This video tutorial will provide step by step instructions to add a motor carrier to the Appointment Scheduling system.	Watch
Editing An Appointment	This video tutorial will provide step by step instructions to edit an Appointment.	Watch
Cancelling An Appointment	This video tutorial will provide step by step instructions to cancel an Appointment	Watch
Login to the Appointment System	This video tutorial will provide step by step instructions to login to the Appointment Scheduling system.	Watch
Adding multiple users to an Appointment	This video tutorial will provide step by step instructions to add multiple users to an Appointment.	Watch