

Order without offer and registering services

To register new customer order you have to click button “New” in a tab “Cust. orders” in the menu on the left.



Then you choose for what kind of services you want to register this customer order:

- Rail transport service
- Truck transport service
- Sea transport service
- Other forwarding service

In each kind of transport you need to fill basic data: order date, customer and payer. Then depending on kind of transport you need to fill further data: cargo, relation, weight and so on. Then click OK.

Then you need to set costs and prices.

Cost calculation

On customer order view there is a “Cost calculation” tab. Go there and click “Add” button.

The screenshot shows a software interface with a tabbed view. The 'Services from selected offered service' tab is active. Below it, the 'Service details' section contains a table with the following data:

Name	Forwarding service	Type (s)	Rail transport;
Rel. \ desc.	058107 - WROCLAW BROCHOW		065003 - STALOWA WOLA ROZW
Cargo	4401 - Fuel wood in logs billets twigs faggots or similar forms wood in chips or particle		
Cargo quant.		Details	Exchange rates

Below the service details, there are two tabs: 'Prices for customer' and 'Cost calculation'. The 'Cost calculation' tab is selected. In this tab, there is a table with columns: 'Measure unit' and 'Curr...'. A red box highlights a green plus icon in the first row of this table, indicating the 'Add' button.

Choose what kind of cost you want to add (freight or additional cost). You will see a window for creating a new cost. Set basic data such as: cost type, cost source, measure unit and currency and then in a grid with cost values click “Add”.

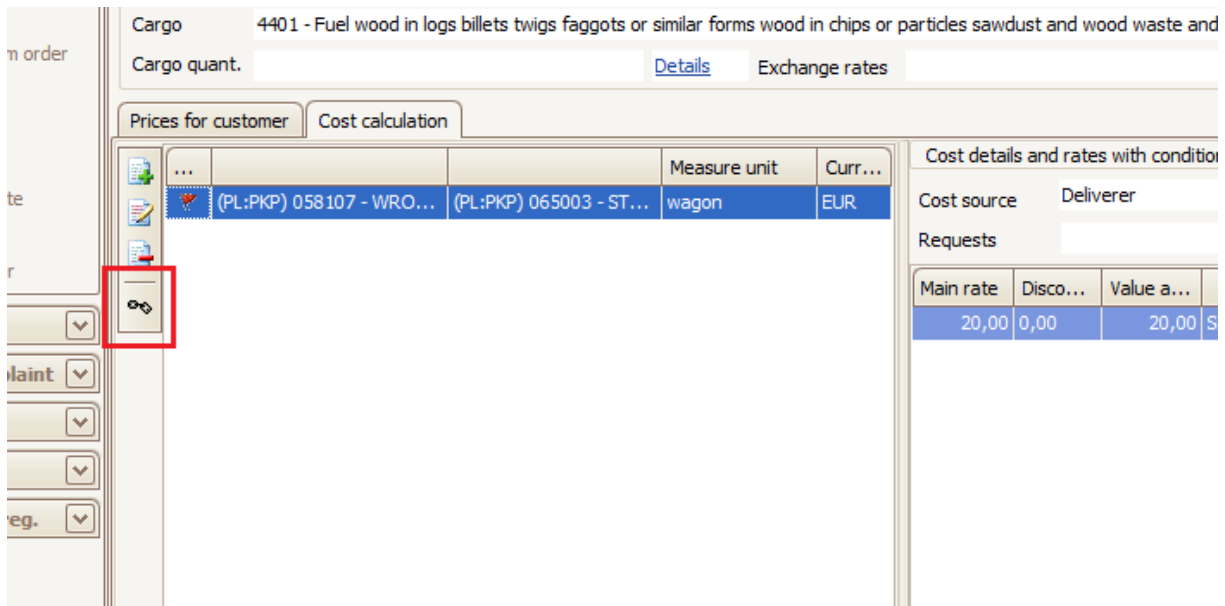
The screenshot shows a window for creating a new cost. At the top, there are fields for 'Currency' (set to EUR) and 'Cost rounding' (set to 0,01). Below these are two tabs: 'Advanced view' and 'Standard view'. The 'Advanced view' tab is selected. In this tab, there is a table with columns: 'Main rate', 'Discount / Increase', '...', 'Value afte...', and an empty column. A red box highlights a green plus icon in the first row of this table, indicating the 'Add' button. At the bottom of the window, there is a button labeled 'Next segment'.

Depending on for what kind of conditions you want to create a cost value you will have to set different data, for example for rail/wagon conditions: ownership, axle count, weight ranges or

minimum weight. Then click OK. Finally you need to set cost value for cost condition you just created. Just enter cost value in “Main rate” column.

Prices for customer

After making cost calculation you can prepare prices based on costs. To do that, in cost calculation grid, choose one or more costs which will be a part of created price and click “Create customer price” button.



You will see a window for creating a price. In a simply way just click “Calculate prices” and “Calculate prices with common conditions”. If it is possible to calculate a price automatically this sum of costs will be calculated. You need to add only a margin (setting % Margin or Margin column) and click OK. You can add prices manually of course by clicking “Add” button in “Prices for customer” tab.

When you go back to “Cost calculation” tab you will see that all costs have color flags. Green means that this cost is included in a price, red means that this cost is not included in a price.

You can add as many costs and prices to your order as you wish but remember not to mix cost/price conditions too much because all these conditions will be checked while registering a service, for example wagon (don’t mix conditions for empty and loaded wagons, because wagon cannot be empty and loaded at one time).

When you make cost and price calculation you have to change an order’s state to “Accepted”. To do this click “Change state” on a left menu and choose “Accepted”.

Copy

Find services from order

Invoice

Change s

Close order

In.inv.

In. inv. complaint

Out. inv.

Remainders

Accts/cash reg.

Name Forwarding service Type (s) Rail transport;

Rel. \desc. 058107 - WROCLAW BROCHOW 065003 - STALOWA WOLA F

Cargo 4401 - Fuel wood in logs billets twigs faggots or similar forms wood in chips or pa

Cargo quant. Details Exchange rates

Prices for customer Cost calculation

Name	Measur...	M.U. r...	Curr...	VAT	Price r...	Rates
Basic price	wagon	none	EUR	0 %	0,01	Tot
						1

In this state you cannot change cost and price calculation for whole order. To do that you need to change state of the order back to "In work". You can do this unless you register a service, for example wagon.

Exception with costs/prices for truck transport services

Only for truck transport services you set cost and prices while registering a new truck service. In a window for registering a new truck service there is a tab "Costs and prices". Go there and set either "Single cost and price" or "Multiple costs and prices".

Cargo and relation Info about truck and driver Costs and prices

☒ Single cost and price ☐ Multiple costs and prices

Choose either single or multiple costs and prices

Cost

Name cost

Net 34 EUR Round. 0,01

Meas. unit ton Round. to kg

Deliverer Deliverer 51009309 RCS

Price

Name price

Price per unit 40 EUR Round. 0,01

Meas. unit ton Round. to kg

VAT 0 %

After clicking OK button you still can change costs and prices by clicking "Edit" button in menu on the left in section "Cust. orders".

Registering a service

To register a service, customer order must be in “Accepted” state. Then go to tab “Services from selected offered service”. In grid “Ordered services” click “Add” button. Depending on which type of services you selected while registering an order you will see a corresponding window. For example for wagon you must set properties such as: Wagon no., dispatch date, real weight and so on. For each service cost/price calculation is copied from customer order and you can see it in the bottom of window for registering a service.

NHM


☐ Coupler wagon

Notes

Quantities 0 wagon;

Costs Single costs: 1; rates: 1

Save and new (F3) OK Cancel Apply

For each service you can change both costs and prices by clicking a button  next to “Costs”. In window that you will see you can add, modify or delete costs and prices.

When you set all properties to registered service click OK. Service has been registered as an ordered service. All you need to do is to move it to executed services. Select this service you have registered and click button “Mark as executed”.

Details Services from selected offered service

Ordered services

No.	Type	
1	Wagon	315118919819

20.

After that you will see a window similar to one you registered a service. Here you can check if all data is correct, you can see quantities that were calculated for this service (for example wagon count or tax weight) and final costs and prices for this service. Then click OK.

Register as many services in customer order as you need to. Then change the state of the order to “Executed”.

Copy

Find services from order

Invoice

Change

Close

Executed

In work

Rejected

In. inv.

In. inv. complaint

Out. inv.

Reminders

Accts/cash reg.

Executed services

No.	S...	C...	Type				
1	Z		Wagon	315118919819	2015-01-08	4401;	45,000

Now you are ready to issue an invoice for these registered services.