Command Alkon Training Manual

COMMANDseries Aggregate

Contents

Toolbars

The following Icons exist on your toolbar to enable you navigate through the system using a mouse:

✔	Accepts the current screen	▦	**Opens** a screen assigned to the icon (such as Orders)
✖	**Exits** the current screen	▯	**Clears** the current screen
▤	Opens a **Save As** screen	▦	Opens a **Request & Search** screen
▣	**Deletes** the current screen	⬇	**Sorts** the entries of a list
🖨	**Prints** the current screen	▣	Opens **screen-specific** help
♏	Opens a **Search** screen	▣	Opens **keyboard-specific** help
▦	Runs the **Replication** Filter	▣	Opens the **Help** file

Shortcuts

Useful Shortcuts to Using Command Alkon:

Function Keys

To...	Press...	To...	Press...
General Help	<F1>	**Add Occurrence**	<F6>
Keyboard Help	<Shift+F1>	**Insert Occurrence**	<Shift+F6>
Screen Help	<Ctrl+F1>	**List**	<F7>
Accept	<F2>	**Detail**	<F8> or <Enter>
Exit	<F3>	**Save As**	<F9>
Clear	<F4>	**Sort**	<Shift+F9>
Remove Occurrence	<F5>	**Search**	<F11> or <Shift+F11>
Remove	<Shift+F5>	**TQS**	<Shift Enter>

Control Key Sequences

To…	Press…	To…	Press…
First Occurrence	<Shift+PgUp>	**Task List**	<Ctrl+J>
Last Occurrence	<Shift+PgDn>	**Clock**	<Ctrl+L>
Next Field	<Tab>	Messages	<Ctrl+M>
Previous Field	<Shift+Tab>	Calendar	<Ctrl+R>
Menu	<Ctrl+Tab>	**Tracking & Scheduling Operations**	<Ctrl+T
Volume Calculator	<Ctrl+B>	**Signalling Operations**	<Ctrl+U>
Copy	<Ctrl+C>	**Paste**	<Ctrl+V>
Calculator	<Ctrl+F>	**Cut**	<Ctrl+X>
COMMANDmap interface	<Ctrl+I>		

1.1   Getting Started

Accessing Command Alkon

- Command Alkon is deployed to all users through the Fujitsu Citrix environment. Once you have logged into your PC/Laptop click on Internet Explorer and enter the following web address http://vcs01.emat.crhpp.net (Development / Preproduction Environment)   http://vcs01.emat.crh.net   (Production Environment).
- In the Citrix User Name field please enter your: windows username: brian.nolan windows password: ******

Domain: ROM01.NET
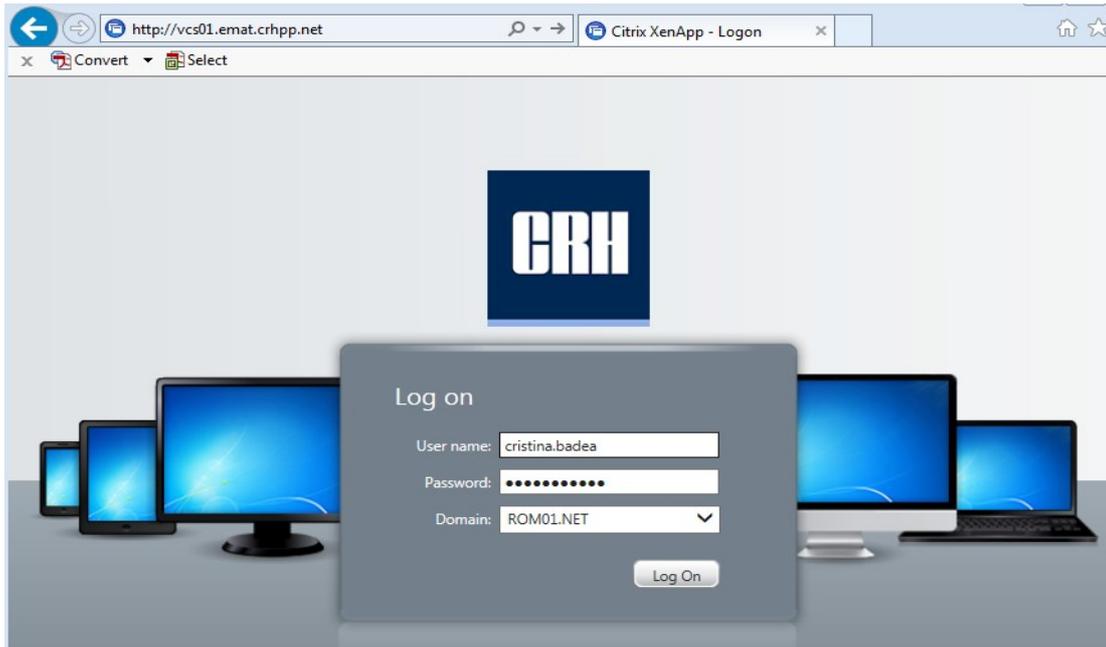
- Double click on the Published Application you want to launch: Command Series, Apex or Commandqc.

- Double click on the Command Series icon. This will open the Command Series.

- Please be patient, it may take a few moments to open. You will then be presented with the Command Alkon logon screen. Here you will need your Command Alkon username and password.
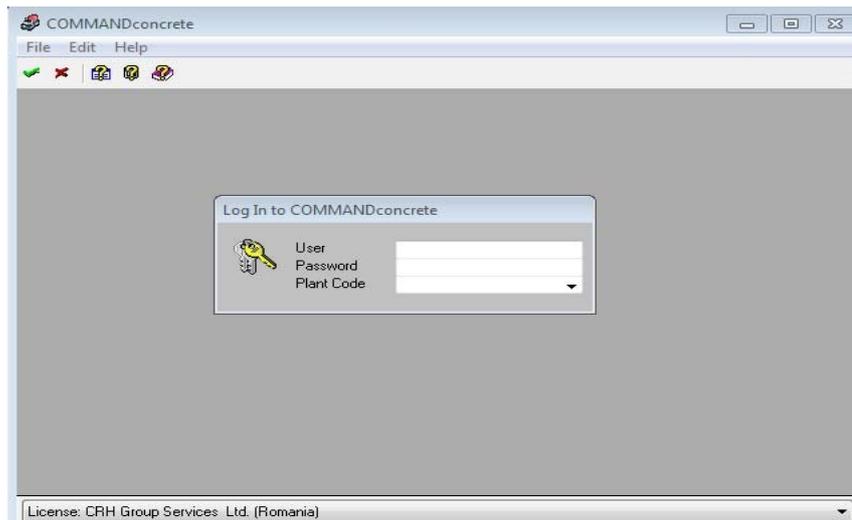
- Enter your username and tab into the password field. Next enter your password.
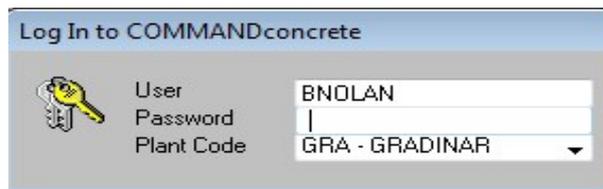
- You are now ready to begin using Command Alkon.
- Should you have any issues logging into either Windows or Command Alkon you should contact the IT Service Desk for Assistance.

1. Creating an Aggregate Order - standard Order from a Project

- Click on Dispatch – Orders.

i. Enter the order date and tab.
ii. Tab through the order field allowing the system to auto-assign an order code.

iii. To find an existing customer – enter the first part of the customer surname or company name and hit return to see the possible matches. The example used was SUP -
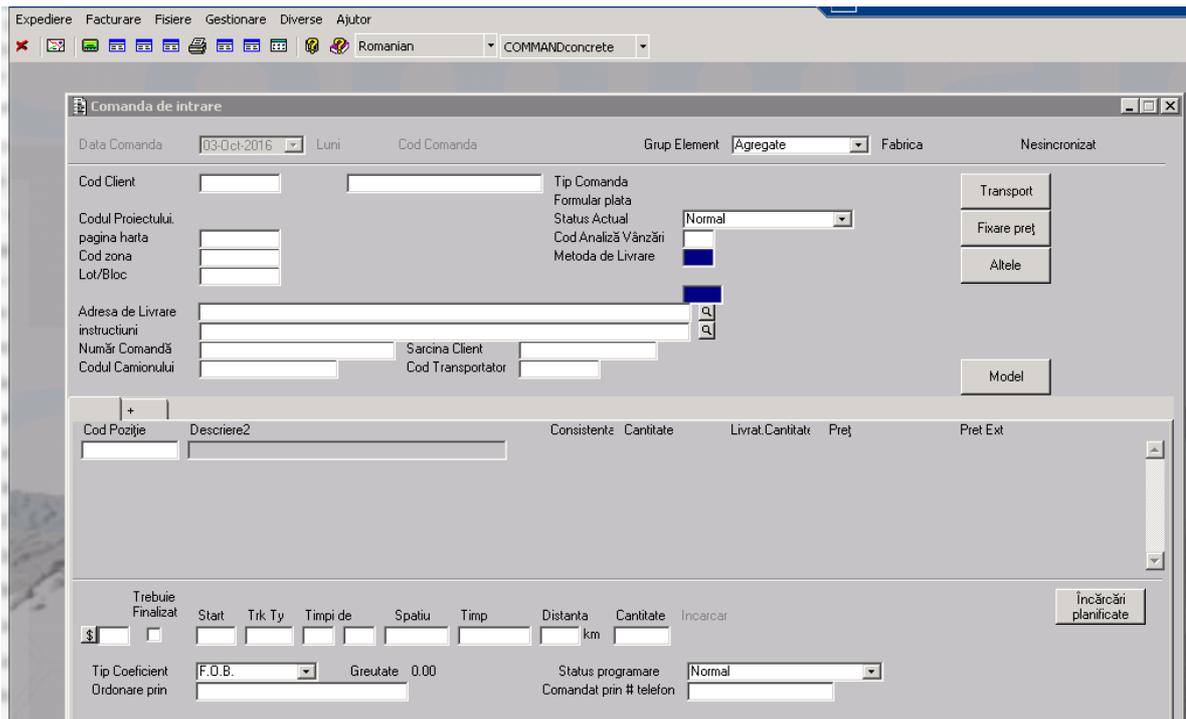
Once you have entered the partial name you can hit the return key (Centre Enter) to display a list of potential matches. Once you have found the correct account, double click on the name to populate the details into the order screen.
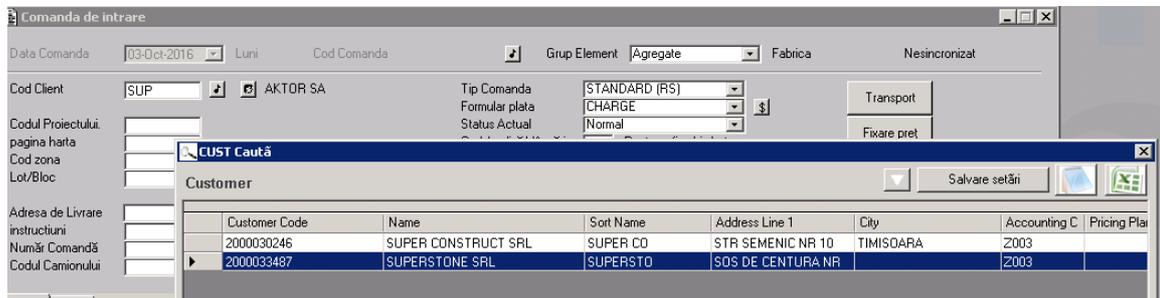
Should any pop up messages boxes appear such as the one illustrated below; you should read the message carefully and if irrelevant click the Esc key to close the box(s) until you return to the order screen.
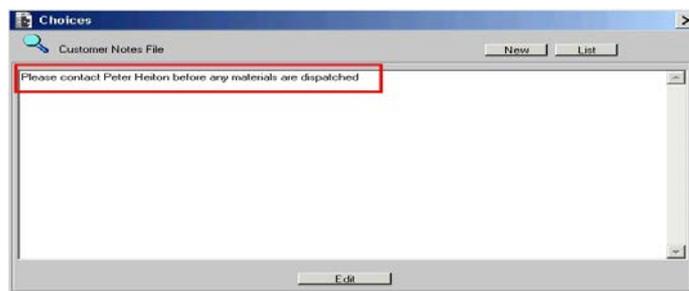
Once the customer code has been entered into the order screen the next stage will be to select the correct project for the order. The project will be unique to the delivery site. Hit ENTER and the full list of available projects will automatically display and the user should select the appropriate project by double clicking on it from the list provided.

A certain amount of data will automatically be populated from the project into the order screen; however there may be some fields that will require the dispatcher to manually enter. When the field is dark blue this means that this field is mandatory and requires a value to be entered. In the following example I have populated the following fields.

1. **Delivery address** – If not a default, use MapIT to populate the address (Please see MapIT Documentation).
2. **Purchase order** – If not a default, manually enter where required.
3. **Zone Code** – If not a default, hit return and select from the list.
4. **Delivery method** – Enter "**D**" for delivered and "**C**" for collected loads. These should come from the Project and already be correct.

The next stage will be to enter the item code(s) you wish to deliver. Hit ENTER to display the available Items. Item codes can be selected from the Project. In the example there are two products available on the Project. Double click on the item required to populate into the order screen.

If the Item is not available on the project, please contact the sales admin team.

If selecting an item available on a project the cartage charge table should default automatically into to the order at item line level. You can check this by clicking on the [H] button to the right of the order item line. The icon will appear greyed out where a value has been stored.

The next stage is to enter the order quantity and schedule the order. Once you have entered the quantity, tab through the fields to the scheduling. For delivered orders you will need to enter the following data as shown below including:

1   The plant code will default in automatically.
2   If the product is available from more than one Plant then you will select Economic Sourcing – Logistics will decide which Plant to Ship from. – **See below**
3   Enter the start time for the order to be delivered.
4   MapIT will automatically populate the distance.
5   Enter the expectant time to job and time from job to plant.
6   Enter the same value in the truck spacing field as above.
7   Click F2 when happy with the scheduled load.

ii For collected orders only a start time is required.

iii The order is now ready to be saved. Hit F2 to save the order.
iv The new order code will be displayed on the information bar at the bottom of the CMDseries. In this example the order code is 11001 dated 3/10/2016.
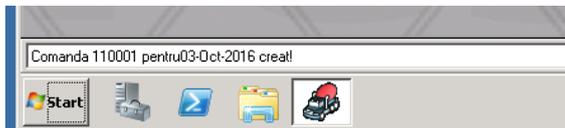
1.5   Different Order Types used

In COMMANDseries the Order must be entered with the correct Order Type

Material Returns
For material arranged to be returned by the Customer and agreed with the Salesman.

Standing Orders

Standing Orders are a great way to have the same order on the system every day.
Examples
- Repeat Orders being delivered over one week to the same site
- The same customer comes in most days for the same Product
- A regular Plant Transfer happens

Standing Orders mean that in Apex Ticketing the Dispatcher has a Dispatch Number, there is no need for him to contact Central for an Order

Standing Orders are created in 2 parts
The Standing Order is created with an expiry date – usually 1 month
The Standing Order is 'Scheduled' for the dates required

Creating a Standing Order – Part 1

- Order Entry – enter S – (P Romania) – TAB over Order Code
- Standing Order Numbers are automatically generated.
- They can only be numerical for Apex. (Alpha are accepted in Concrete only)
- <u>After creating a Standing Order you must Schedule the Order</u>
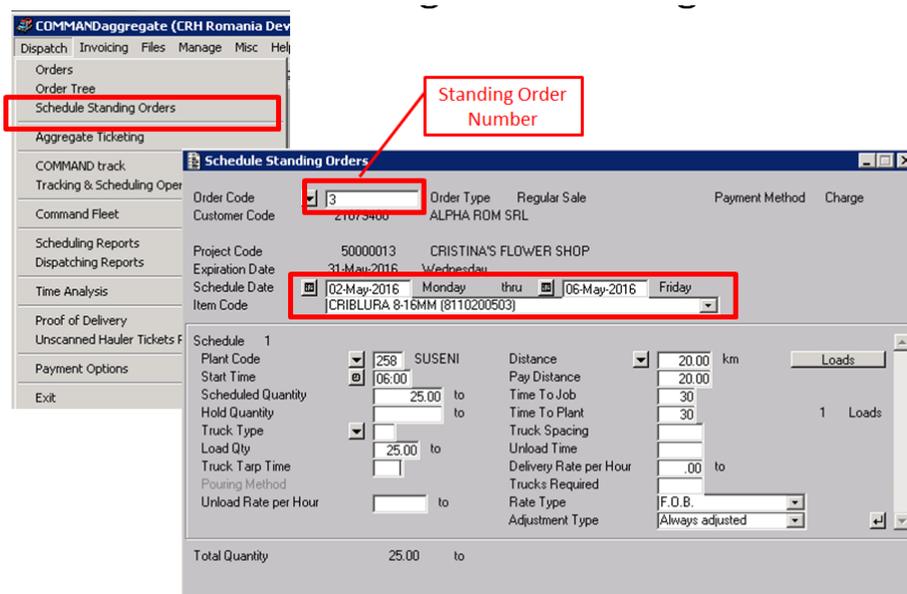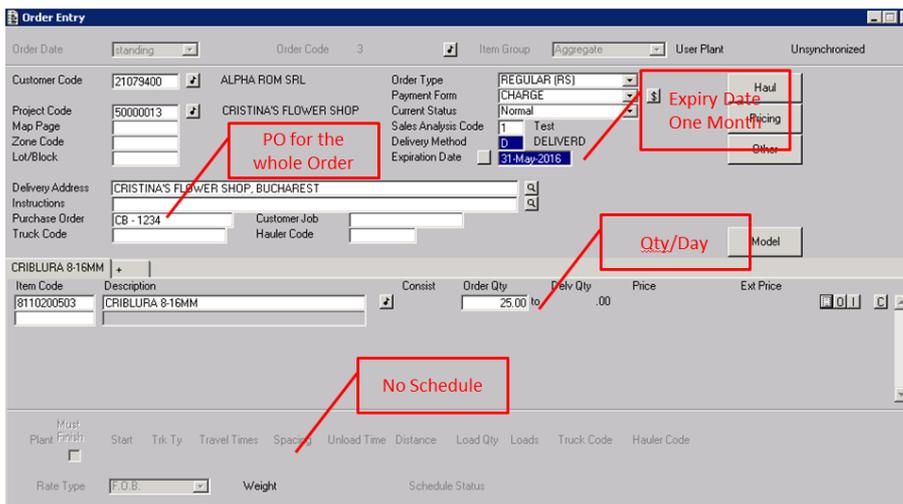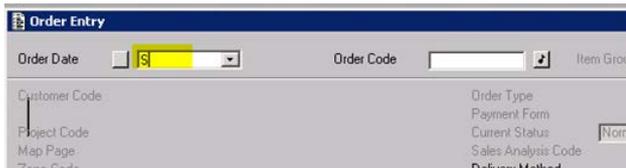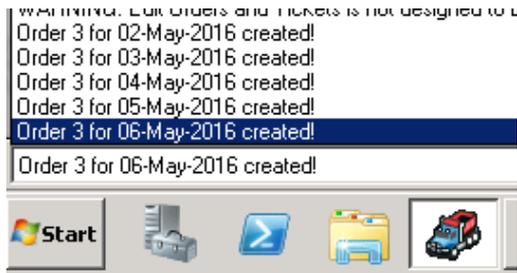
- Order number 3 exists on each of the days created on the Standing Order Schedule.
- Generally Standing Orders would not be created for more than one month at a time
- If the Orders are cancelled each order has to be individually cancelled and will take too long if a large date range is entered
- Good practice is one week or one month at a time

Economic Sourcing

- If the product is available from more than one plant then the Scheduled Plant will be blank. Click the $ button to the left of the field and select the first Option line. This is what the system believes is the most cost effective dispatch location – LOGICTICS will then release this order and allocate the correct Plant if necessary.
- For ECONOMIC SOURCING Orders – you must SUSPEND the Order – this will show Logistics that they must review and correct.

2. Ticketing in Apex

Each User has a login and permissions according to the User Group they are in. To login to Apex select the Apex Icon and enter your User ID and password. Depending on permissions you will log on as the Plant that you are based at.

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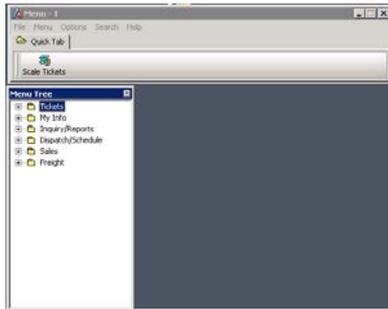
A basic Apex menu appears as the example here. Users will have access to different parts of Apex. Rail users will see different options to Aggregate Plants.

- Most of your orders will be raised Centrally in COMMANDseries
- These Orders are passed to Apex Ticketing at the plant
- You can use the drop down to select the Order
- Search Using F3 – type in the first few letters and press F3, repeat
- Or type in the Order Number if known

Scale Tickets Screen

Simple Ticketing (without Rosters)

1. Select the Order (or enter Truck if Rostering is being used)
2. Select your Truck – type in the full number of the first part and press F3
3. The Haulier will populate after selecting the Truck

4. Record the Tare – F10 – Truck goes to Load
5. Record the Gross and Print Ticket – F5

Different Types of Ticketing
• A standard deliver or collect ticket – the Order has been raised at Central in COMMANDseries
• A ticket reprint
• Duplicate Ticket
• Return Aggregates Ticket
• Internal Transfer Tickets
• Cash & Carry

Other common functions in Apex
• Setting up a new Collect Truck & Trailer
• Daily Reports

Material Returns
When material is returned Central will have an order number which is to be used. The truck is Grossed in at the weighbridge, tips off the product for inspection and then leaves recording his tare.
Select the Incoming Type – the Receive Ticket will be highlighted on the screen in yellow.
To Gross the Truck in hit F4
To Weuigh Out F5 – the Gross weight will have been recorded and the tare stored exiting the Plant.
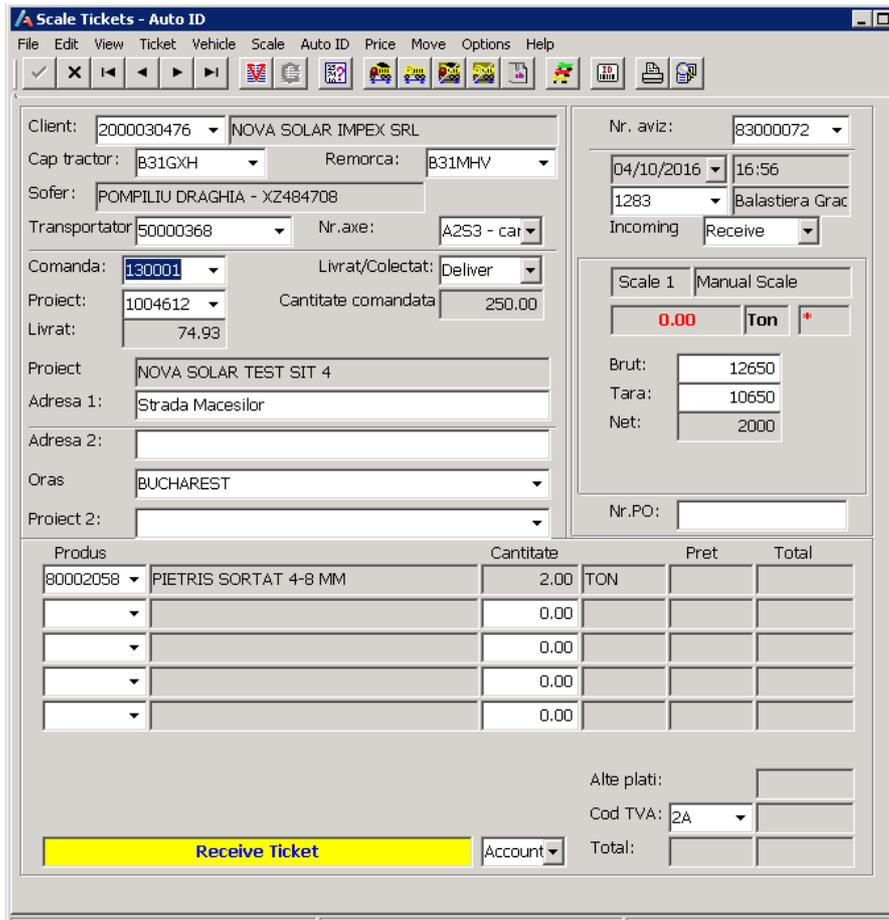
Quick Tabs

Apex Customize your screen

Click Options – Customise Tabs - then drag the required Icons onto the Tab.
Add more Tabs and rename if required. Once you have used the system you will know which Icons you like to use the most.
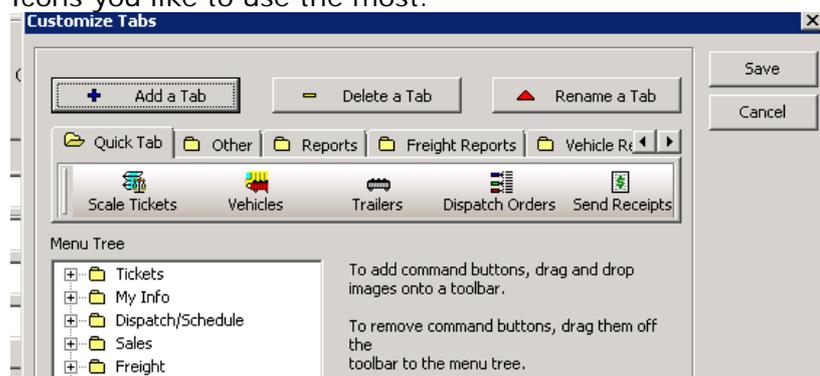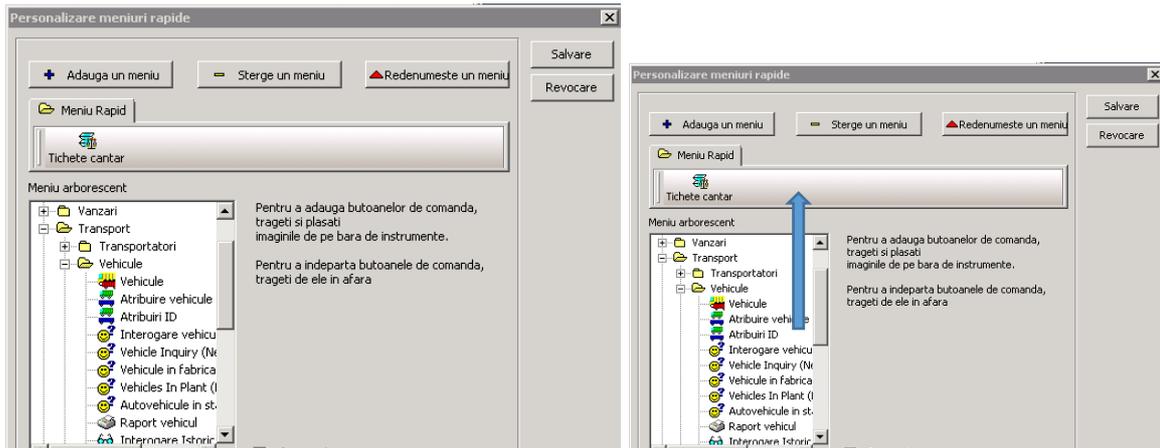
3. Edit Orders & Tickets

- When changes are made at Customer/Project level, and Orders are in existence for this Customer/Project then the changes must be made at Order level as well. These changes could include different Rep. Codes, site delays etc. Basically any changes which do not involve the pricing on the Order will have to be changed at Order level.
- Edit Orders & Tickets can be used to modify a ticket or order. It could for example be used to change a truck code or a product code on a particular ticket that had been inputted in error.

- Go to Invoicing, Edit Orders and Tickets.
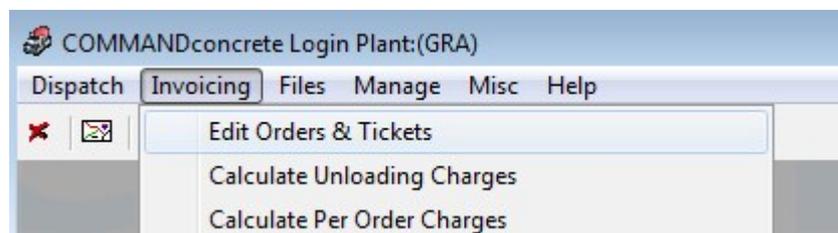
- Enter the required Date & Order Number. (if unknown, hit return and select from list).
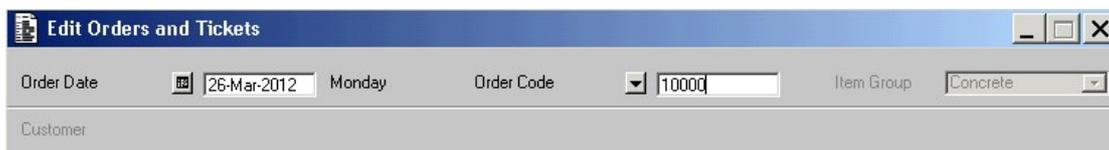
- In this case the wrong truck code was used when the order was originally ticketed. Truck 155 was used; how-ever it should have been truck 177. To view the tickets associated with this order, click on the tickets button located in the bottom left of this window. NOTE: If you wished to change to the product code, it would be advisable to modify the relevant project to include this new project code to avoid future errors. To add a new product code at Edit Orders & Tickets level, click on the add occurrence button located to the right of the product code line ⏎. This will add another line

where you will now enter the item code and details etc. Finally you will follow the steps below to change the product code on the ticket.

- In this example there is only one ticket associated with this order (if there is more than one ticket, simply select the correct ticket using the ticket number located on the left hand side of the screen). We will now change the truck code from 155 to 177. We will then click F2 to save these changes.

- Finally click F2 on the Edit Orders & Tickets Screen to exit this window. Note: The ticket may have been updated on the cartage side with the original truck. If so you will be prompted with the below message. Select Yes to ensure the correct truck (171) is paid for this load. The Ticket will then be updated on the Cartage side.
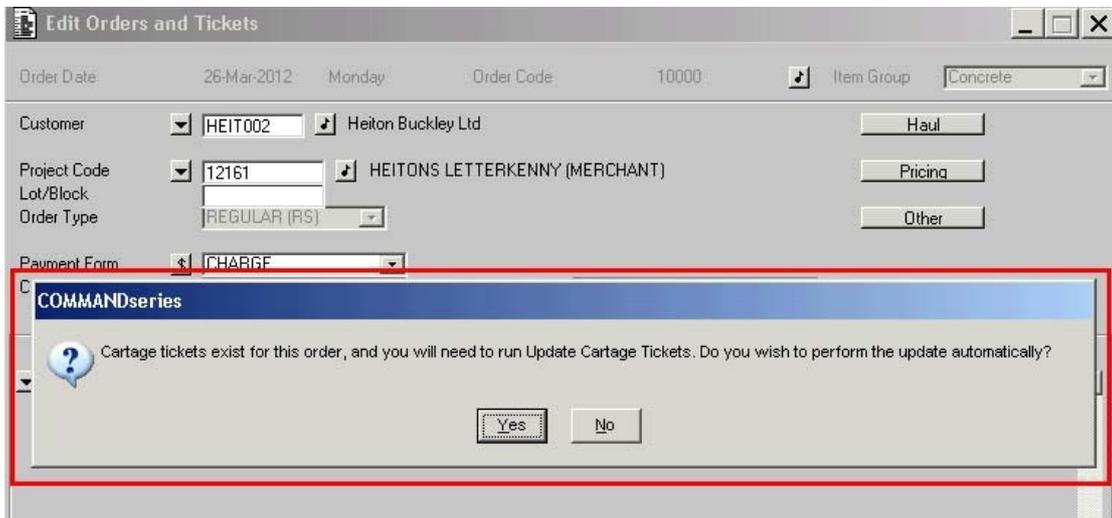
3.1 Removing / Deleting an existing ticket through Edit Orders and Tickets

- To remove / delete an existing ticket the following steps should be followed. A cancelled ticket report records the details of any ticket removed including date and user who removed the ticket.
- Call up the original ticket through edit orders and tickets. Click on tickets button. Click on the status button. Click Remove.
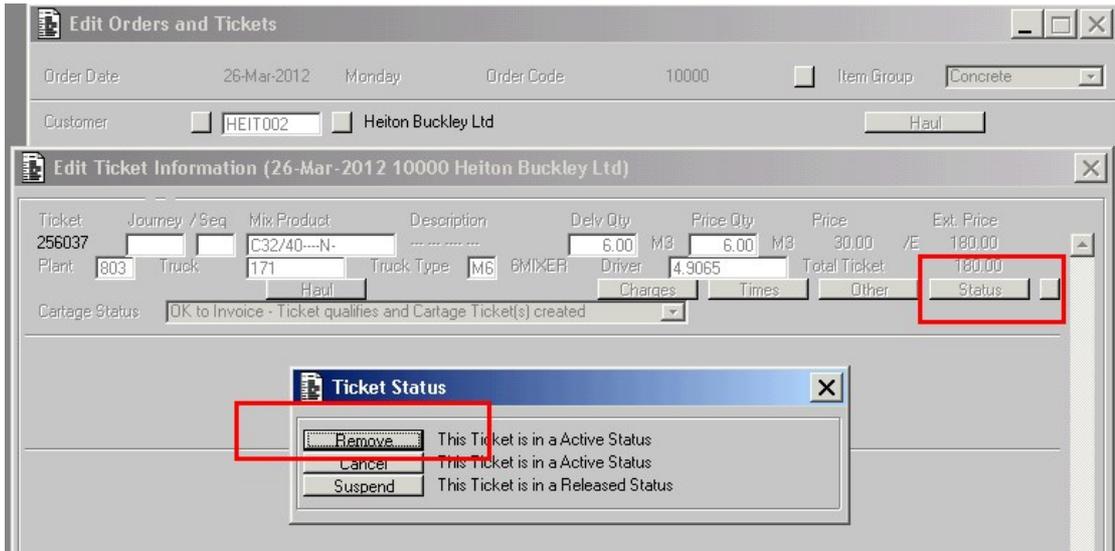
- Select the appropriate remove reason code from the list displayed. Click F2 to exit screen Click F2 to exit ticket screen and F2 to save changes. If you receive a message asking you to update cartage tickets always click YES.
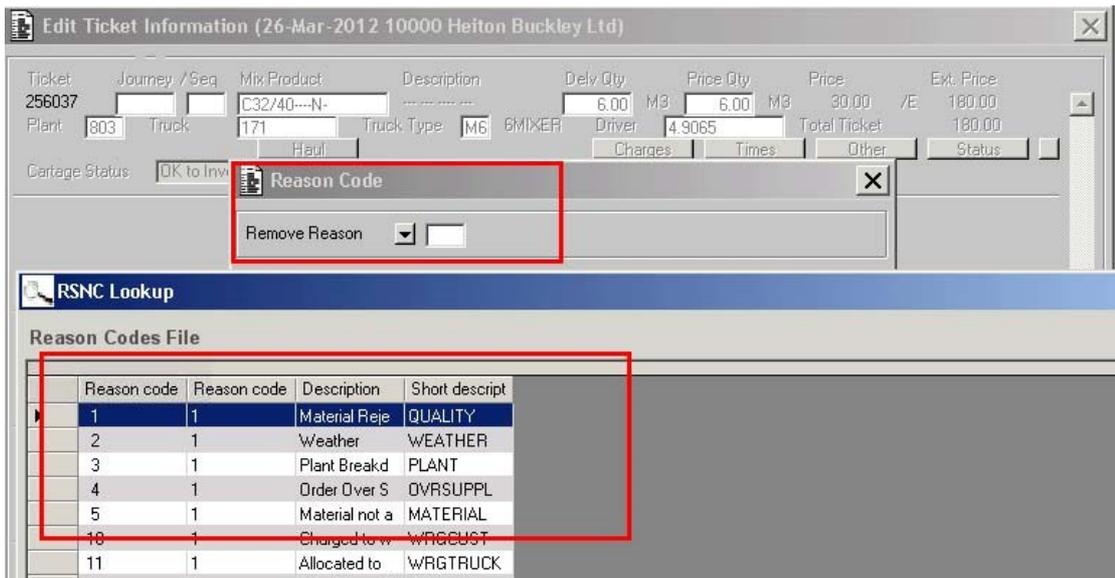
4. **Generating & Receipting a Cash Order – Quick Customer**
   Ensure you are logged in as the Plant which the Order is to be raised – eg. A Quick Customer Order for Fusea, the User will need to be logged on as Plant 284 in CMDSERIES.

4.1   Creating a prepaid cash customer & order

A cash order can be created through the Order screen.

- Click on Dispatch –Orders

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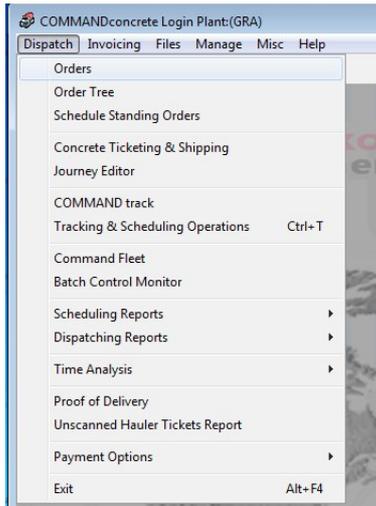
- Enter the Order Date and then Tab through field to allow the system to auto-assign a new order code.
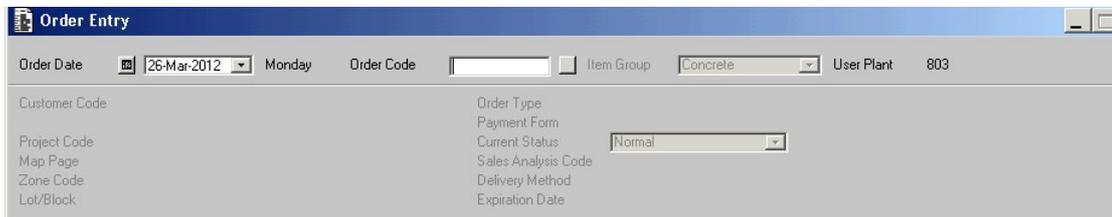
- Once the new order code h been populated – Click into the customer code field and tab through. You will be presented with the quick customer edit window where you can begin entering the customer's details as shown below.
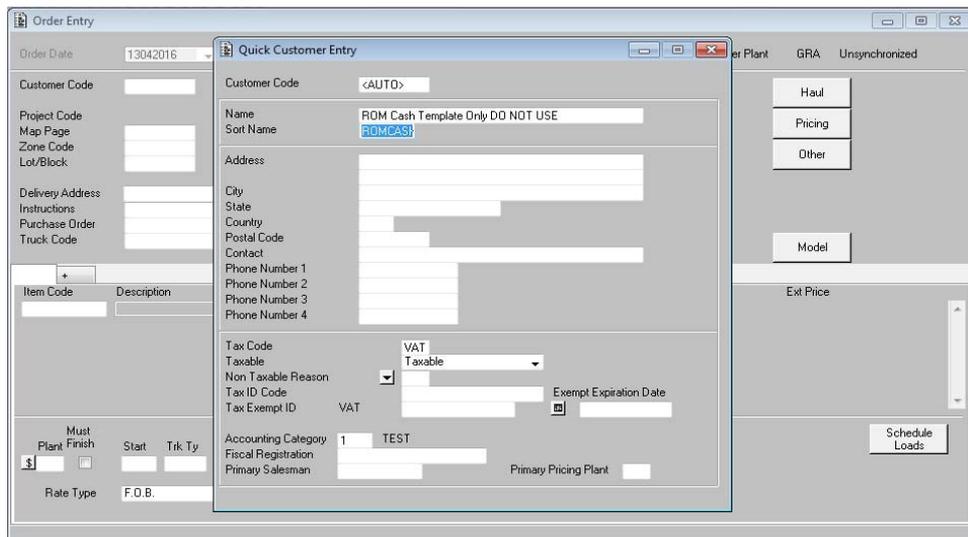
- You can now over-type the pre-entered data from the template with the customer's actual details as shown below. <u>The tax code and accounting category should not be modified.</u>
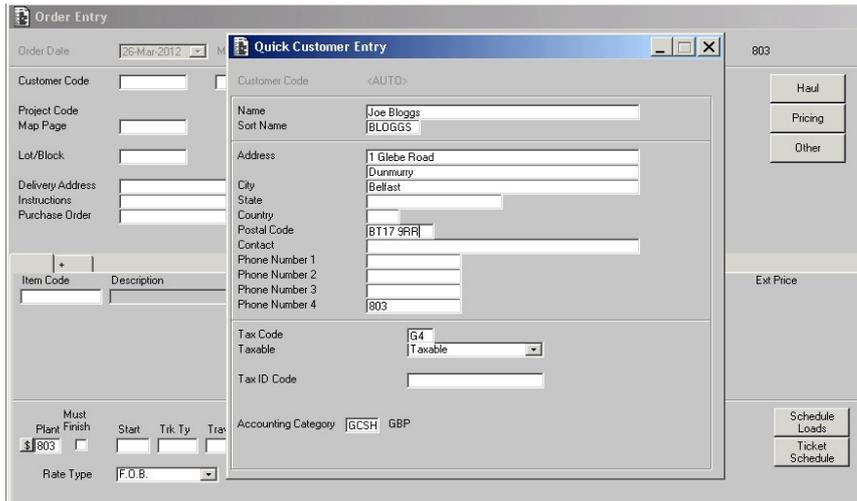
- Click F2 to save the new customer details. You will then be asked for the customer's payment method. Select the appropriate payment type and click F2 to save.
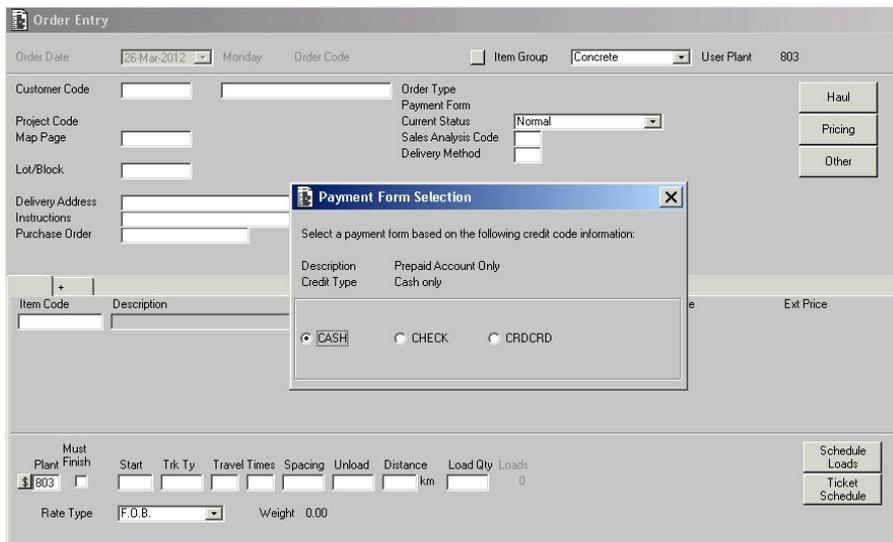
- The customer's new account code will be automatically populated into the Order screen as shown below and the payment form selected.

- The delivery address can be entered as collected.
- If it is delivered Load use MapIT to populate the Delivery Address.
- Next select the product required and enter the order quantity. Double click in the Item Code field.
- Enter a start time, Load Qty for the collected Order on the schedule and hit F2 to save the order.

The payments screen will pop up – or click Payments Button
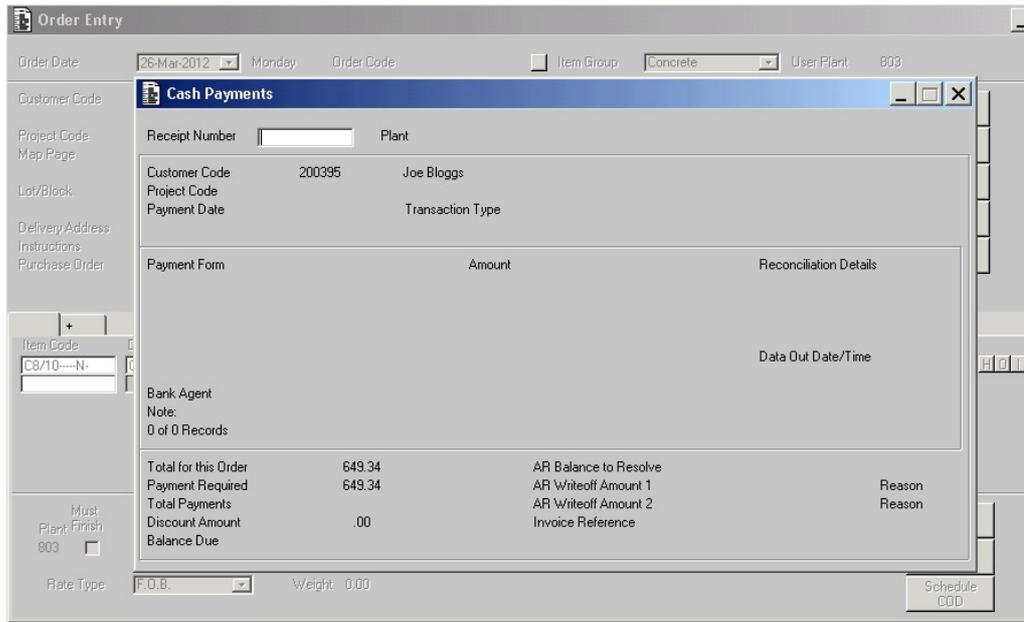
2.2   Receipt payment and ticket the order

- Tab through the Receipt Number field to allow the system to auto-assign a receipt number.
- The cash payments window will now display the correct customer code and the amount due. If the payment method is "Cheque" or "Credit Card" some standard information such as card number, expiry date etc will be required. These addition fields will only display when the payment form is applicable.
- Enter the Fiscal Number in the Notes field – **This must be done for the payment to be sent to SAP.**
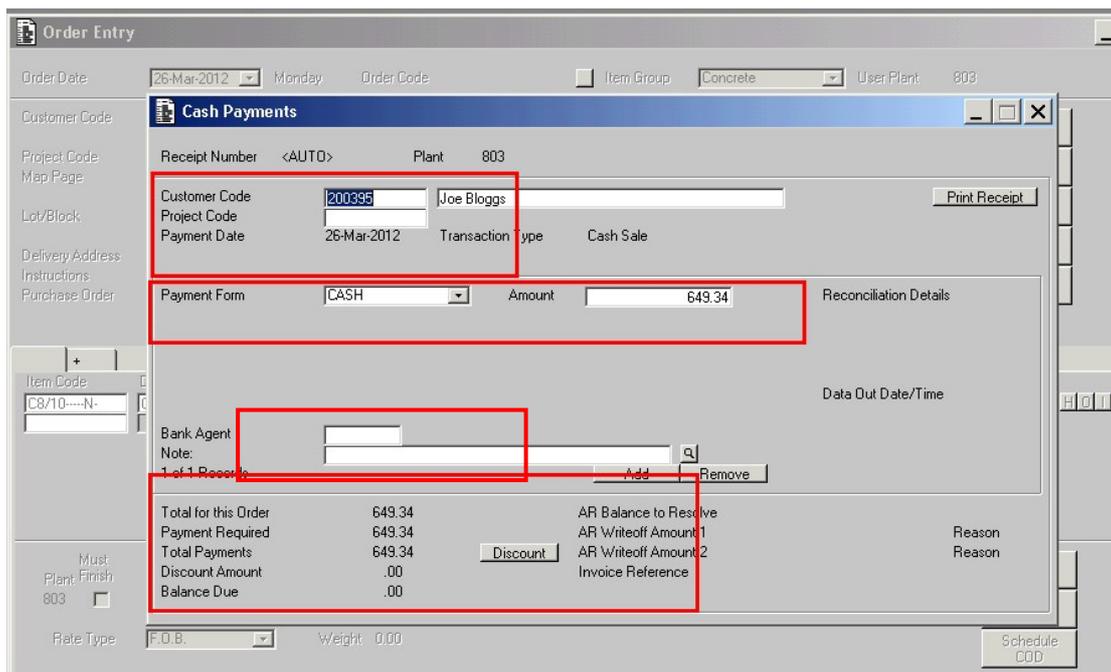
- Once you have received the physical payment; click F2 to complete the process. The receipt will automatically print to your default printer.

2.3 Cash & Carry — at Plant — Apex Ticketing

- A project for each Plant will exist
- These hold the standard price lists for each Product at that Plant
- Tickets are done in Apex at Plant and the Payment is taken in cash for each ticket

1. Enter Cash Account
2. Enter Plant Project Number
3. Select Product
4. Enter Truck Code
5. Confirm weights
6. Accept Payment Screen
7. Enter Fiscal Number in the Comments box

The payment transfers to COMMANDseries and the Fiscal Number must be entered.

3.5 Cash Reconciliation

The Cash Reconciliation needs to be done every day before close of business.

Processing a cash reconciliation

- COMMANDconcrete/aggregate – Dispatch – Payment Options – Reconciliation Report.
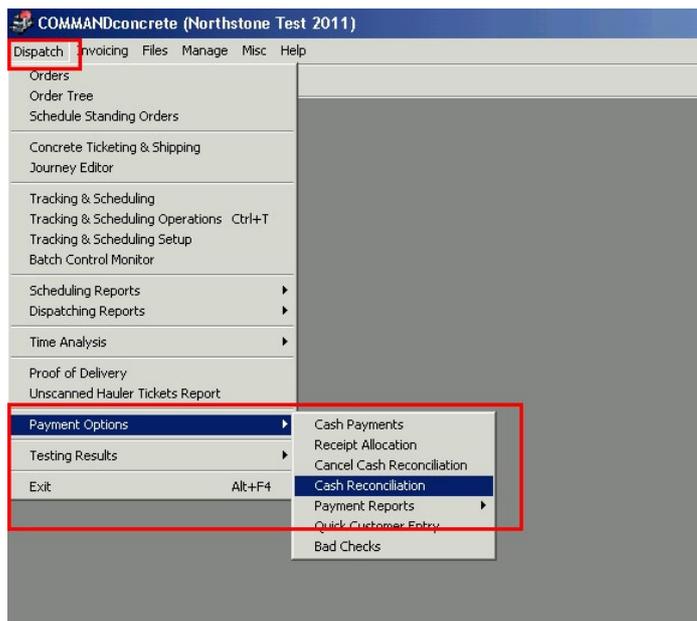
- In the Reconciliation Date field enter Today's date, hit tab and then tab again, the Payment method should be set to All.

- In the Cash field, enter your total cash amount which counted from the till. In the Check amount field enter total check amount which is counted the till. In the Credit Card field enter the total credit card amount taken for Credit Cards.
- Note: the Cash amount will include the Beginning Balance (float).
- Difference Over/Under should be 0 for all, if everything is correct. The total amount taken (Cash, Checks etc) equals to the total amount entered into the system. If the is a difference a **Cash Reconciliation Out of Balance** will need to be done.
- All transactions and their detail will be shown in the Cash Reconciliation (i.e. Receipt Number, Pmt Meth etc).
- Uncollected Ticket details will be shown also.
- The next step is to select the **Next** button.

Cash Reconciliation

			Cash	Check	Direct Deposit	Credit Card
Plant Code	801	CROAGHAN				
Reconciliation Date	12-Mar-2012	Total on Hand	7131.70	500.00		650.00
Sequence Number	001	Less Payments Logged	6931.70	500.00	0.00	650.00
Payment Method	All	Less Beginning Balance	200.00			
		Difference Over/(Under)	0.00	0.00	0.00	0.00

Sort

Receipt Number	Pmt Meth	Customer Name	Transaction Type	Ticket Code	Order Code	Order Date	Payment Amount	Unallocated Amount	Status	Notes	
10067	Cash	DAVID	Payment on	10026	10020	06-Mar-2012	960.00	360.00	Okay		A
10068	Cash	DAVID	Payment on	10028	10022	06-Mar-2012	600.00	.00	Okay		A
10069	Cash	DAVID	Payment on	10029	10023	06-Mar-2012	64.00	.00	Okay		A
10071	Cash	RACHEL	Payment on	10030	10002	07-Mar-2012	360.00	.00	Okay		A
10074	Cash	TEST	Payment on	10031	10005	07-Mar-2012	900.00	.00	Okay		A
10076	Cash	Con Murphy	Payment on	10045	10035	07-Mar-2012	60.00	.00	Okay		A
10077	Cash	John	Payment on	10046	10037	07-Mar-2012	216.00	.00	Okay		A
10078	Cash	John	Payment on	10047	10039	07-Mar-2012	32.40	.00	Okay		A

Uncollected Tickets

Ticket	Order Code	Order Date	Truck Code	Driver	Payment Amount	Amount Due	Difference	Resolution Reason Code
10027	/ 10021	/ 06-Mar-2012			.00	60.00	60.00	
10029	/ 10023	/ 06-Mar-2012			128.00	864.00	736.00	
10048	/ 10039	/ 07-Mar-2012	XT		.00	32.40	32.40	
10095	/ 10006	/ 12-Mar-2012	CE02XRG	HA Tipper	.00	120.00	120.00	

Preliminary Report   Next >>   Cancel

Cash Reconciliation Out of Balance

Plant Code   801   CROAGHA
Reconciliation Date   12-Mar-2012
Sequence Number   1

Cash on hand is over/(under) by 0. Check on hand is over/(under) by 0. Direct Deposit on hand is over/(under) by 100. Credit Card on hand is over/(under) by 0. Please select "Previous" to return to the previous screen and correct the problem or enter a c

<< Previous   Next >>

- Select the Reconciliation Report; this will print the Reconciliation Report. ☐ Enter the "Cash to be kept in the Cash Box".
- Enter the Bank Deposit Reference.
- Enter the Credit Card Batch Number.
- Select Done when you are finished, you can always go back a step by selecting the Previous button.

- The Reconciliation Report Selections appear.
- Select the required detail.

- Print to your specific printer.

- All the specific details of the Cash Reconciliation are shown on the Cash Reconciliation Report.

Plant Code	Receipt	Payment Date	Bank	Payment Method	Customer	Name	Transaction Type	Ticket	Order Code	Order Date	Payment Amount	Allocated Amount	Difference
801	10067	06-Mar-2012		Cash	200284	DAVID DOYLE	Payment on Acc	10026	10020	06-Mar-2012	960.00	600.00	360.00
801	10068	06-Mar-2012		Cash	200284	DAVID DOYLE	Payment on Acc	10028	10022	06-Mar-2012	600.00	600.00	.00
801	10069	06-Mar-2012		Cash	200284	DAVID DOYLE	Payment on Acc	10029	10023	06-Mar-2012	64.00	64.00	.00
801	10071	07-Mar-2012		Cash	200285	RACHEL BOYLE	Payment on Acc	10030	10002	07-Mar-2012	360.00	360.00	.00
801	10074	07-Mar-2012		Cash	200287	TEST DISCOUNT	Payment on Acc	10031	10005	07-Mar-2012	900.00	900.00	.00
801	10076	07-Mar-2012		Cash	200289	Con Murphy	Payment on Acc	10045	10035	07-Mar-2012	60.00	60.00	.00
801	10077	07-Mar-2012		Cash	200290	John O'Connor	Payment on Acc	10046	10037	07-Mar-2012	216.00	216.00	.00
801	10078	07-Mar-2012		Cash	200290	John O'Connor	Payment on Acc	10047	10039	07-Mar-2012	32.40	32.40	.00
801	10080	07-Mar-2012		Cash	200291	Phelim Conlan	Payment on Acc	10058	10045	07-Mar-2012	480.00	.58	479.42
801	10081	07-Mar-2012		Cash	200292	mr john o connor	Payment on Acc	10059	10046	07-Mar-2012	210.00	210.00	.00
801	10082	07-Mar-2012		Cash	200294	ccunningham	Payment on Acc	10060	10048	07-Mar-2012	120.00	120.00	.00
801	10083	08-Mar-2012		Cash	200178	TEST	Payment on Acc				240.00		240.00
801	10100	09-Mar-2012		Cash	200309	Kara Watt	Payment on Acc	10081	10011	09-Mar-2012	24.00	24.00	.00
801	10101	09-Mar-2012		Cash	200310	Joe Smith	Payment on Acc	10082	10012	09-Mar-2012	24.00	24.00	.00
801	10105	09-Mar-2012		Cash	200311	Jim Doyle	Payment on Acc	10085	10015	09-Mar-2012	381.30	376.80	4.50
801	10106	09-Mar-2012		Cash	200313	Brian Nolan	Payment on Acc	10086	10018	09-Mar-2012	1200.00	480.00	720.00
801	10107	12-Mar-2012		Cash	200314	John Doe	Payment on Acc	10094	10003	12-Mar-2012	60.00	47.52	12.48
801	10108	12-Mar-2012		Cash	200318	Lorna Hallliday	Payment on Acc				1000.00		1000.00
801	10110	12-Mar-2012		Check	200328	test	Payment on Acc				100.00		100.00

3.2   Cash Reconciliation Reprint

• COMMANDconcrete/aggregate – Dispatch – Payment Options – Payment Reports - Reconciliation Report.
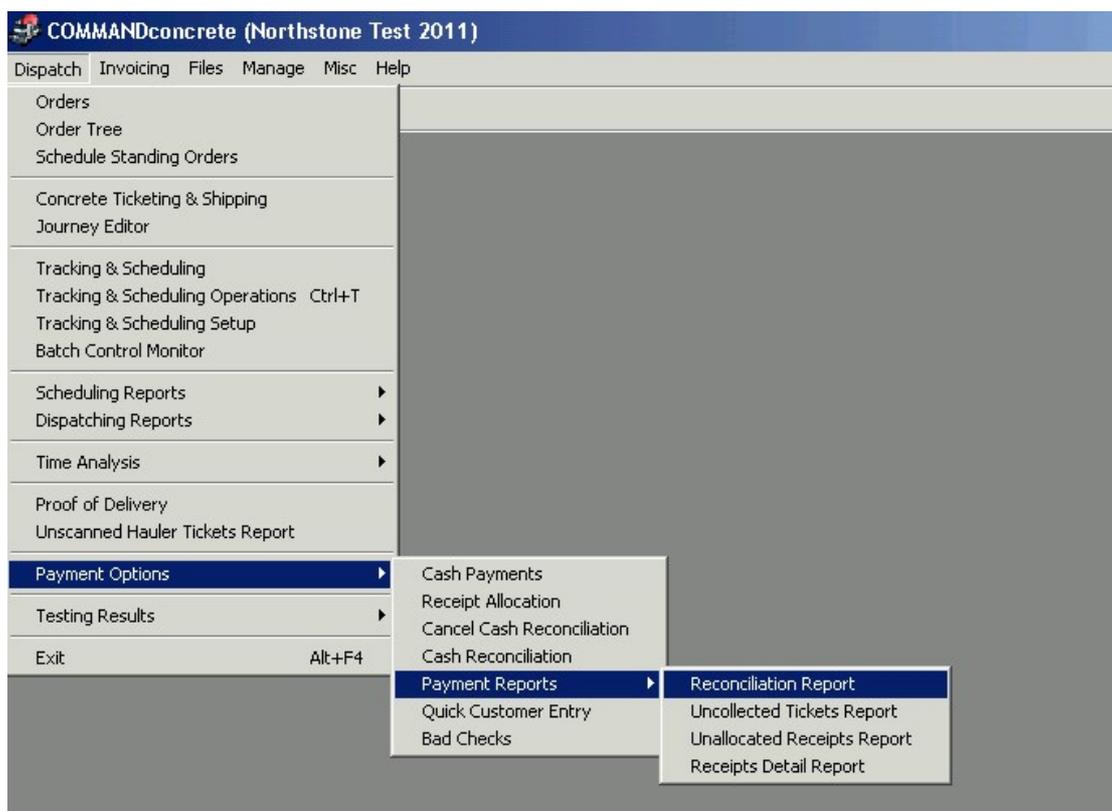
• In the Plant Code Field enter (i.e. 801), In the Reconciliation Date enter the required date, Hit F2.

- Print to your specific printer.

- All the specific details of the Cash Reconciliation are shown on the Cash Reconciliation Report.

6 Command Track

6.1   Command Track Tracking Screen Overview

The Tracking screens display information directly related to the scheduling, dispatching, and tracking of customer orders. The order taker uses the scheduling information to make sure that sufficient resources are available to meet a requested order. Dispatchers use this information to make decisions regarding truck and driver usage during the course of a day's deliveries.

To Load the Command Track Tracking Screen:

- In the COMMANDseries menu, select Dispatch – Command Track.
- The program will load. The title bar will initially read "Accessing Database . . . Please Wait" as the system builds the display from order, schedule, and truck records.

The initial screen layout is determined by the user's individual Command Track Configuration. The default screen used here will be Concrete Tracking. Note you can set up Command Track for Aggregate as well. Tracking Screen (Standard Concrete Tracking)

6.2   Tracking Screen Layout

The Tracking screen displays all critical information about a day's business.

Tracking screen
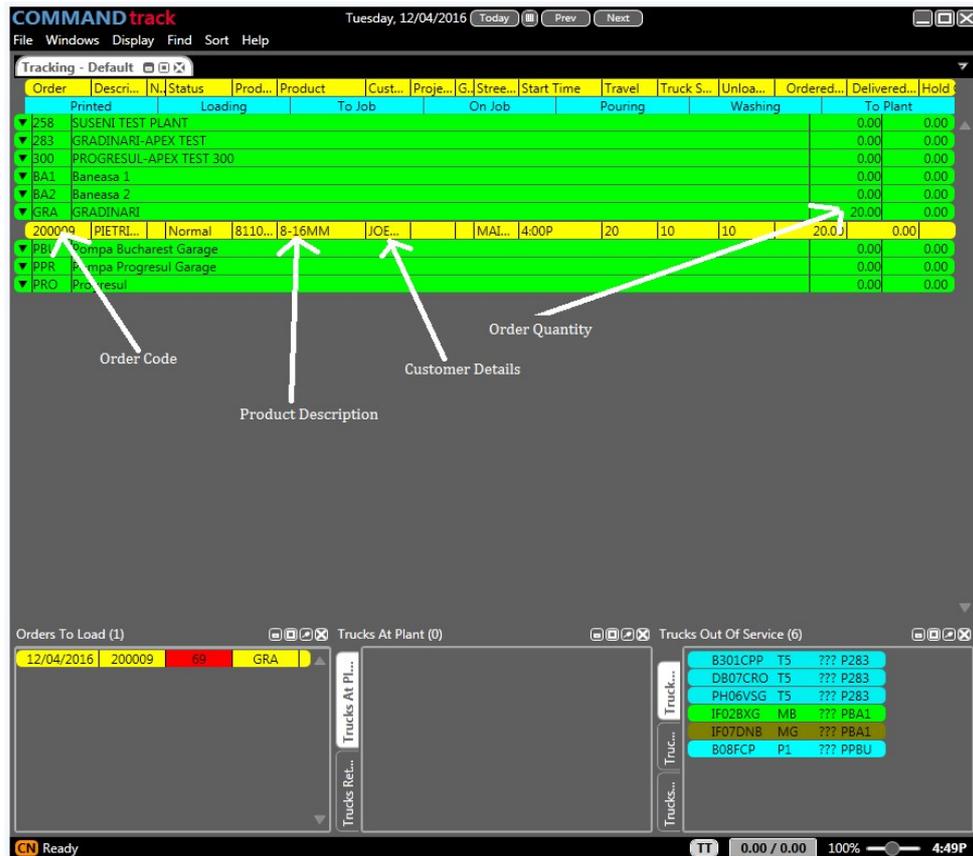
6.3   Drag and Drop Functionality

The COMMANDseries Command Track screen lets dispatchers ticket trucks simply by using the mouse to "drag and drop" a truck to an order.

To punch a truck in:

- Display the Out of Service pane.
- Select a truck, and drag it to the appropriate Plant Line. When you release the truck, it will be clocked in, and will appear as In Yard.

You can use the same method to transfer a truck from one plant to another.

To ticket an order using drag-and-drop:

- Using the mouse, point to the desired truck token and click the left mouse button.
- Holding down the button, drag the pointer to the order you wish to ticket. You may drag to the Order Line for the desired order, or drag to the load token in the Orders to Load section.
- Release the left mouse button. The ticketing screen displays; the order, truck, and load information will default into the appropriate fields. Review the information for accuracy, making any necessary changes (driver, load size, etc.).
- Accept the screen to generate the ticket.
- When an order is ready to load, generate a ticket for the order, either by dragging the truck token to the load, or from the ticketing screen.

Changing Truck Status

- Dispatchers will need to update the status of each truck manually, based on communications from the drivers.

- To change a truck's status, simply click on the truck token and drag it to the new status. You may drag to the new status underneath the order line, or you may drop it on the appropriate status column header.

5   Search settings for Logistics

6.1 Order Code Search Settings ☐

Enter in the Order Date.

- In Order Code field, centre enter, right click on the mouse and Select.
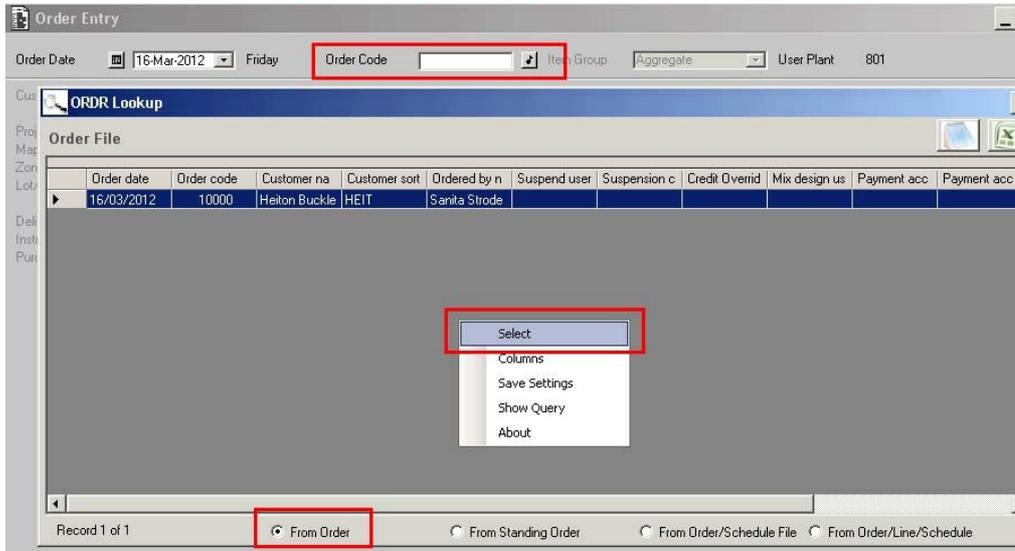
- Please add the following search criteria. Add the appropriate Pricing Plant Code or range of Pricing Plant Codes. The From Order Radio button should be selected. Hit F2.
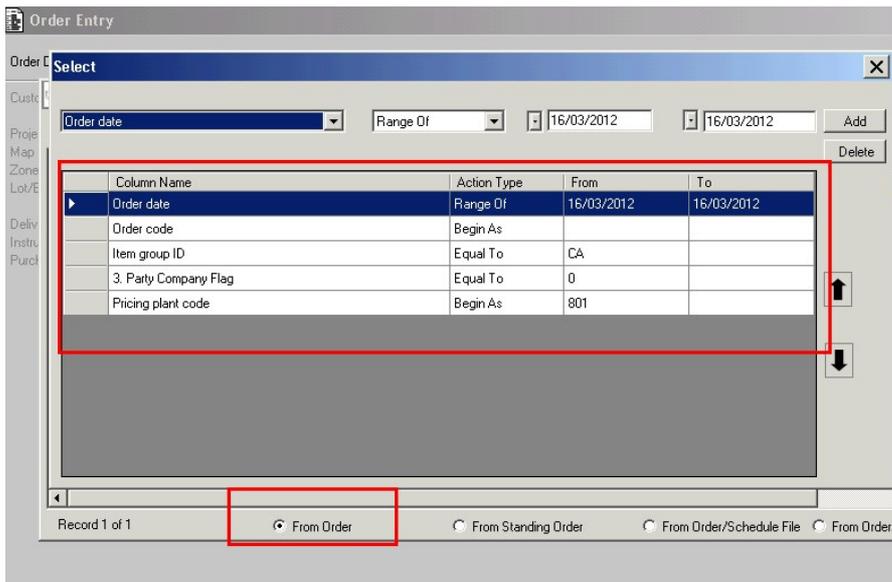
- Now right click with you mouse and select Save Settings. These settings will become your default settings. Note: You can carry individual searches at any time.
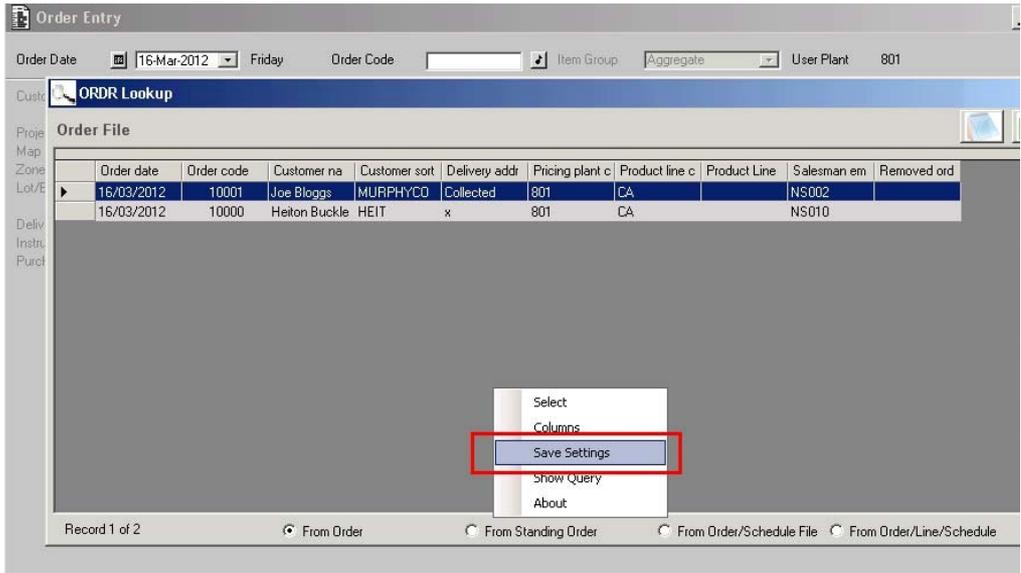
- Hit F2, this will show all orders that have a Pricing Plant Code i.e 801.
- If you hit the From Order/Schedule File Radio button this will show all orders that have a Schedule Plant Code (i.e. 801).
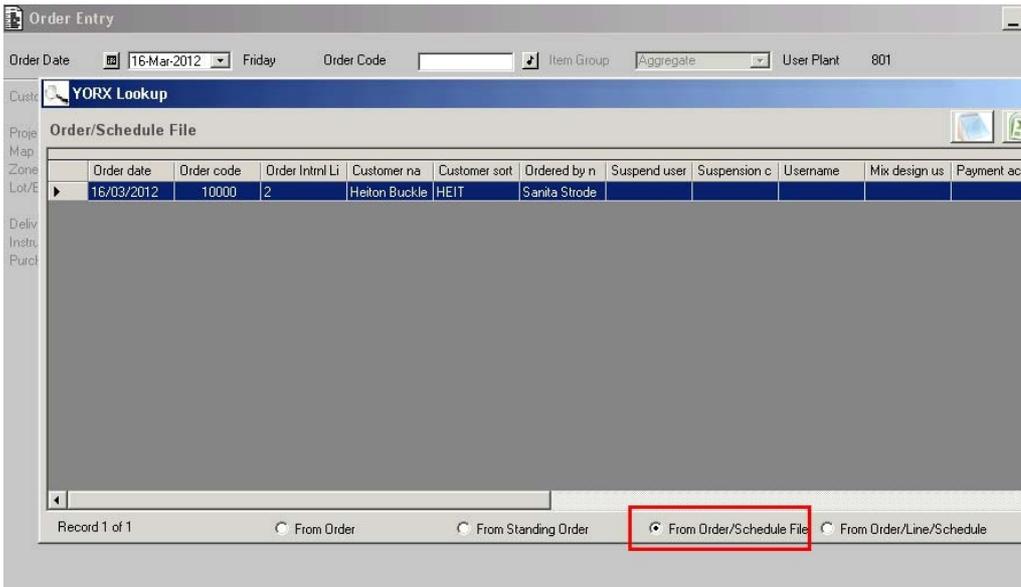
These are the default columns that are required to be set up. Individual searches can be carried out. Note: the radio button From Order is selected.

- Select to Save these settings (Default).
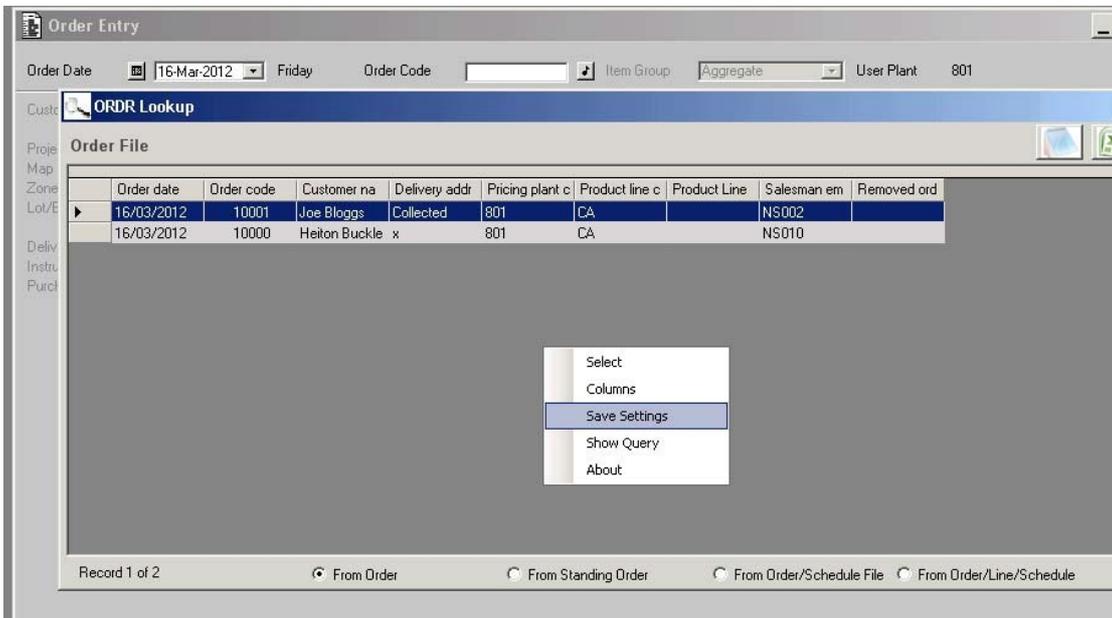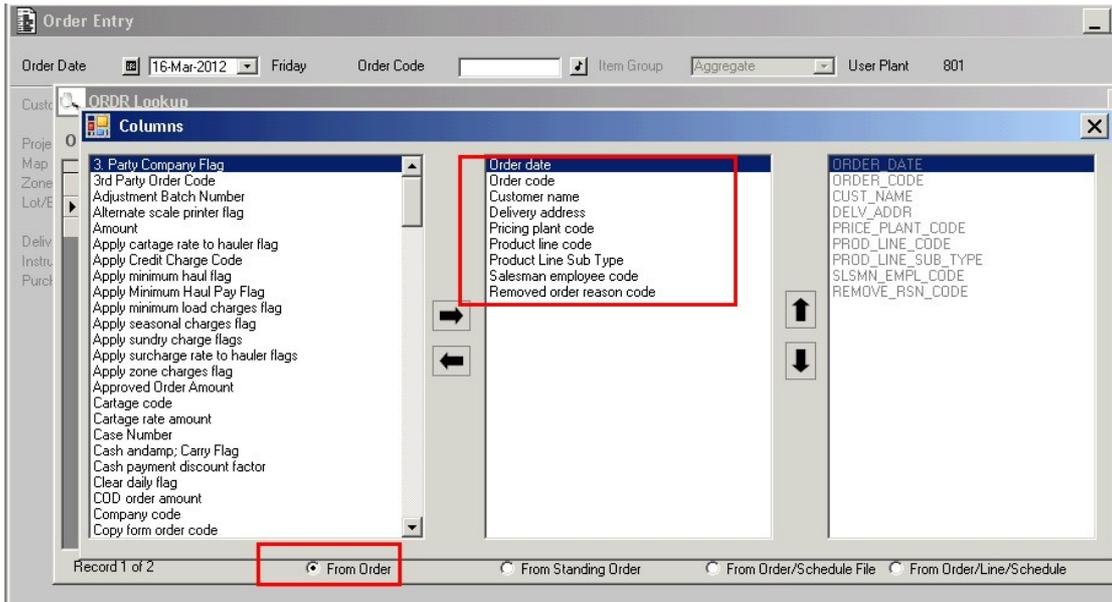
- These are the default columns that are required to be set up. Individual searches can be carried out. Note: the radio button From Orders/Schedule File is selected.
- Select to Save these settings (Default).
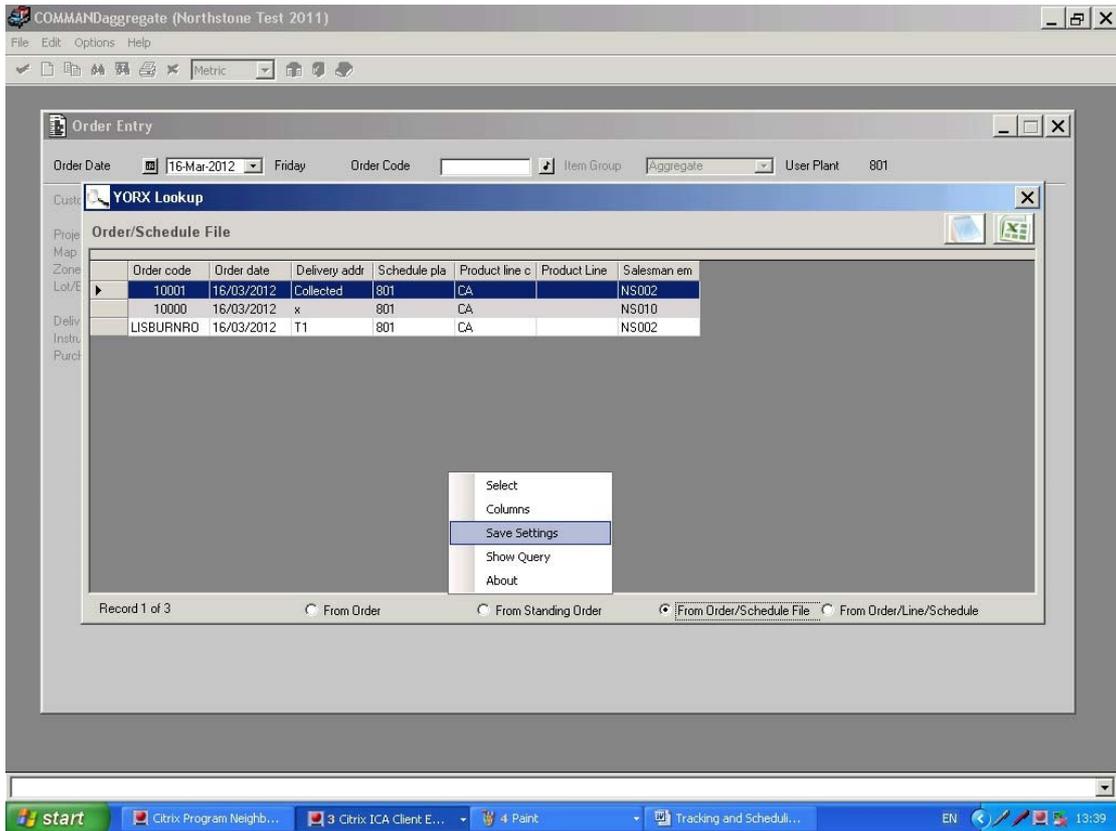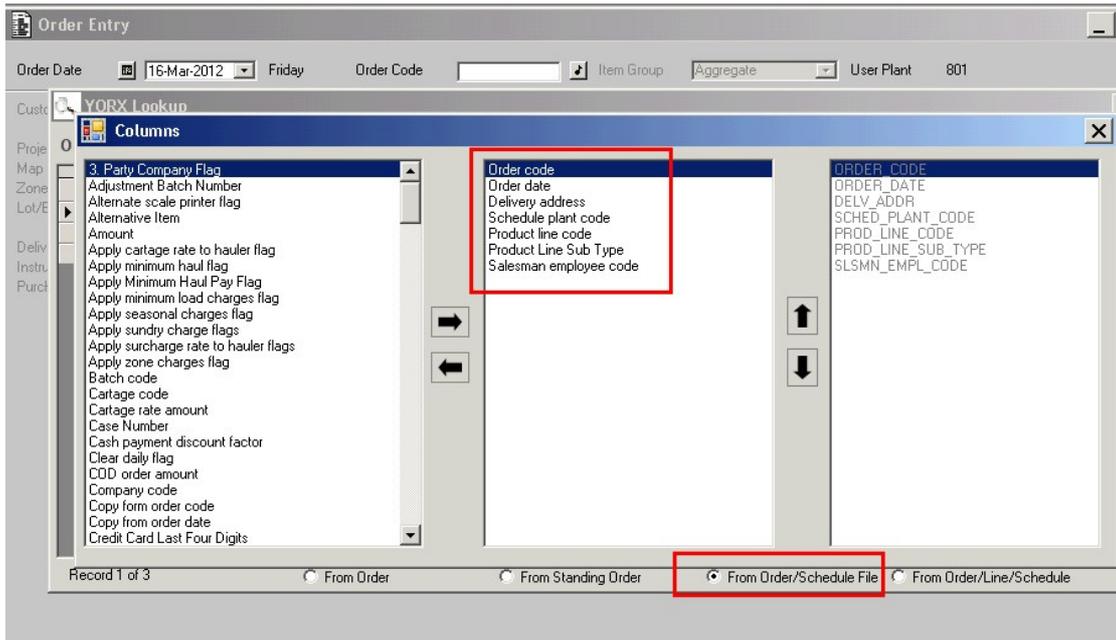
6.0   Customer Search settings on the Order

- Type in the first two letters of the surname i.e HE and hit centre enter.

- Right click with the mouse and Select.
- Select your default search settings for the Customer Lookup. ☐   Select to Save these settings (Default).

- Set up your default Customer Columns.
- Set up your default Customer Columns as seen below.
- Select to Save these settings (Default).

6.3 Project Search Settings on the Order ☐

Centre Enter on the Project.

• Centre Enter on the Project. This brings up the Projects for that Customer.

• Right click with the mouse and Select.
• Select your default search settings.
• Select to Save these settings (Default).

- Set up your default Project Columns as seen below.
- Select to Save these settings (Default).
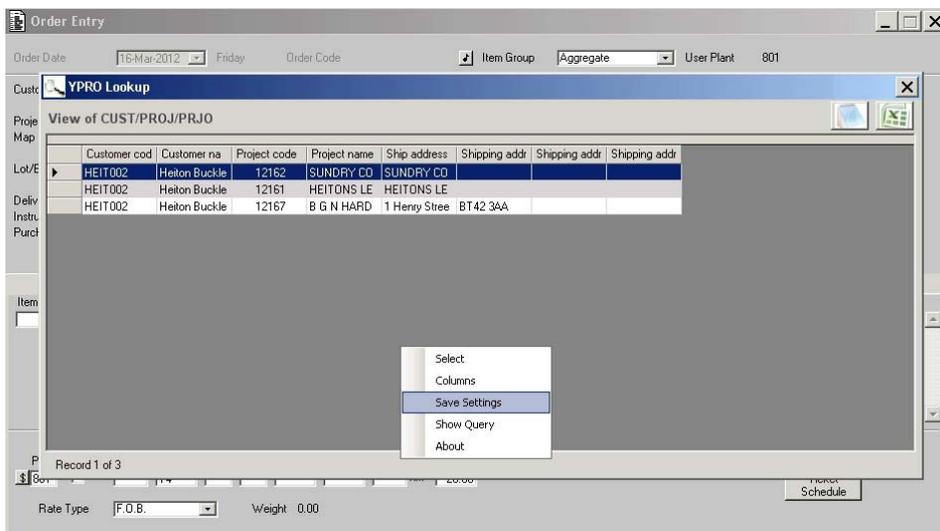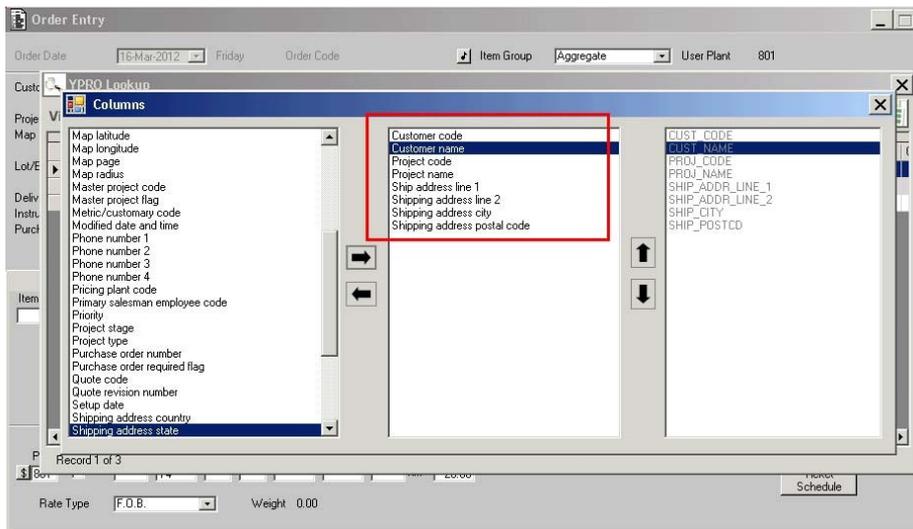
6.4 Order Item Default Search Settings (Concrete Plants – Project Items)

Order Item Default Search Settings (Concrete Plants – Master Item List)
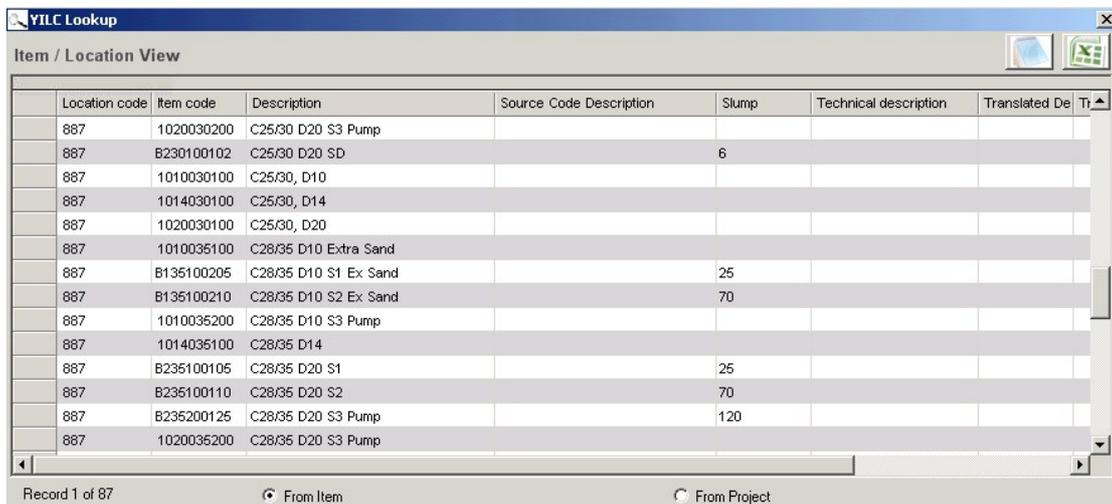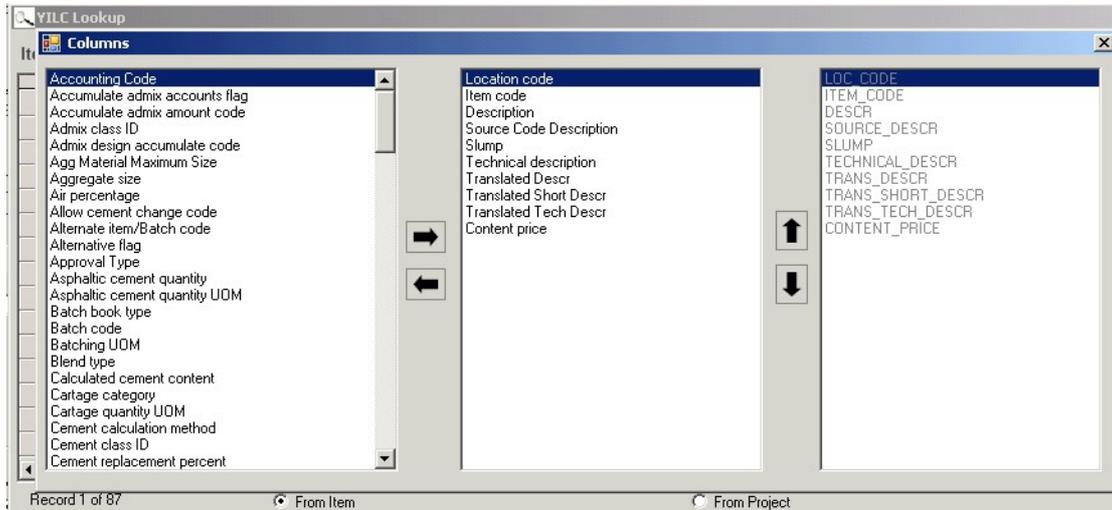
7 MapIT

What is MapIT?

MapIT is a system for calculating distances (both road and radial) from Romanian plants to customer sites / delivery locations. Putting accurate distances on tickets will help ensure hauliers are paid correctly, haulage costs are reported correctly and will also help keep errors, queries and corrections to a minimum.

The application is launched from the Command Alkon system and allows the user through the use of postal codes to pin point exactly where the delivery location is. It also allows the user to search for a delivery location. Once a destination is found MapIT will create a route from the origin plant to the delivery location.

The decision to choose MapIT for our mapping requirements was based on many factors, some of which are:

- MapIT can pin point exactly where an address is through the use of postal codes. This is the main advantage for CRH Romania using MapIT. ☐ MapIT can supply radial and road distances.
- Google and others can find places where there is an existing address. If we are delivering to a green-field site which doesn't yet have a postal address, MapIT provides a facility to manually pinpoint the site location.

Company Policy

MapIT will be used throughout all CRH Romania locations.

The application must be used to populate the correct distances for all Jobs, this will then flow into Quotes (if a Quote is spawned from this Job) and then flow into Projects (if a Project is spawned from this Quote).

MapIT will be used for Prepaid Orders where a Project does not exist.

Any changes to the address of an existing Order that has been MapIT mapped will require a new Order to be opened and MapIT mapped.

Any changes to the address of an existing Job/Quote/Project that has been MapIT mapped will require a new Job/Quote/Project to be opened and MapIT mapped.

MapIT will now be available from all screens where a delivery address field exists.

7.1   Procedures

Project and Order creation

Quotes and Projects use MapIT to obtain the correct delivery distance from Plant.

Prepaid customers where repeat deliveries are anticipated a project need to be created (For "one-off" Prepaids it is not a requirement to open a Project).

When taking the customer's details you should ensure that you receive the full postal code and postal address of the site.

The Postal code would be the recommended option to use, you can enter it in the delivery location finder in the address search field, then from the drop down select the correct full postal address.

If you do not have the postal code you can enter the delivery address in the delivery location finder, in the address search field, select find address, then from the drop down select the correct full postal address.

It is not sufficient to input a Phone number, mobile numbers and/or short hand addresses into the delivery address field. Where an existing Quote/Project/Order does not have a full valid address entered, MapIT must be called and a correct address entered and verified.

Step 1: Open the Quote/Project/Order screen and enter the correct name in the Search Icon – Shipping Address Info.
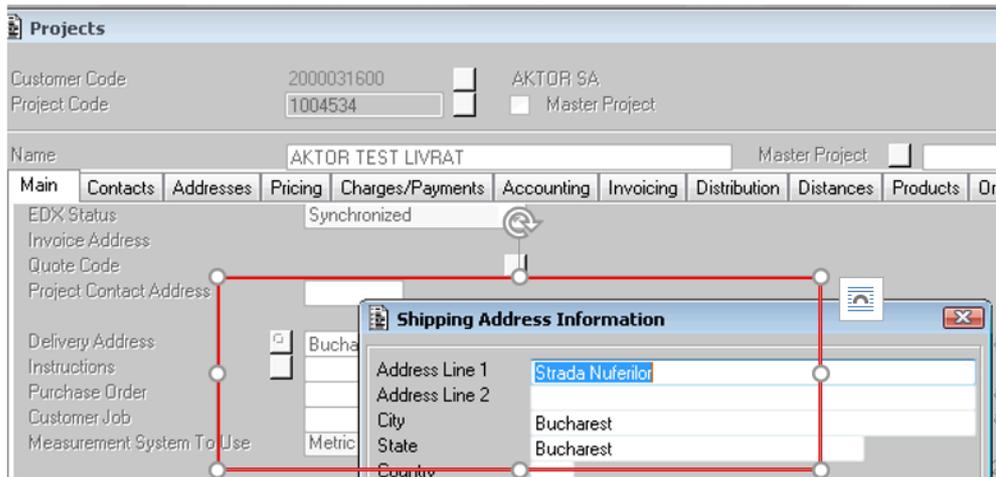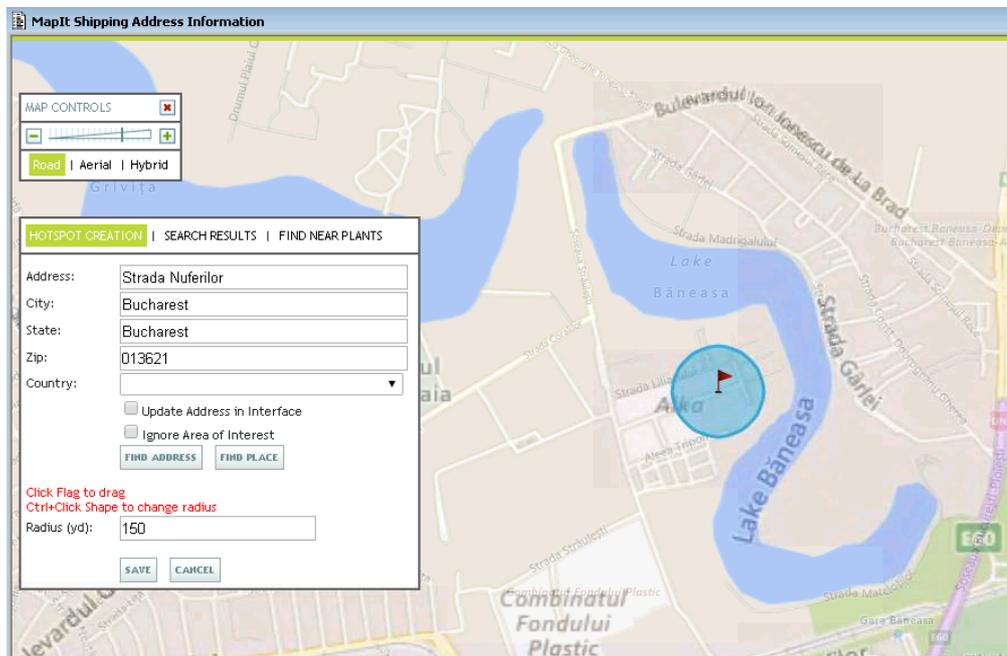

Hit CTRL I, this calls MapIT.

You may also enter part of the address in the then click Find Address. Then select the address. The system uses a predictive search and will narrow the potential results based on the data entered. It is advisable to leave no spaces between commas etc as shown below. When correct address has been found double click on the correct address and then click okay to begin the distance calculations.

Where a project exists and the distances have been verified by MapIT, all details will automatically populate into subsequent orders/tickets. In the event that a project is not available (i.e. one off prepaid), MapIT must be called from the order screen used at time of order creation.

The MapIT application is available from all Orders screens, including Edit Orders and Tickets. In this example we will use the Aggregate Order screen to create an Order for a Prepaid customer. The steps shown here are the same for all Order screens.

TECHNICAL SUPPORT

Reporting application errors/system downtime
Should a user experience any technical issues or receive any unusual error messages they should contact the IT Service Desk immediately on TBC.