

Autodocketing

Modified on: Wed, 28 Nov, 2018 at 1:55 PM

The auto docketing feature when enabled, automatically creates docket numbers for bookings once they've been saved. Auto docketing can be configured per client and can be setup when creating a new client or when updating an existing one.

The screenshot shows the 'Company' profile form for 'Example Client'. The 'Auto Docket' section is highlighted with a red box. It contains a checkbox labeled 'Auto Docket' which is currently unchecked. To the right of the checkbox are three buttons: 'Prefix', 'Start', and 'End'. The 'Prefix' button is highlighted in grey. Below the 'Auto Docket' section is a 'Booking Memo' text area. At the bottom of the form, there are checkboxes for 'Stop Credit' (checked) and 'Booking Alert' (unchecked). The 'Added' date and time are '2016-08-10 13:16:22'. The client ID '69678' is displayed in the top right corner. The bottom of the form has three buttons: 'Delete', 'Clear', and 'Save'.


Details		Places		Profile	
Company: Example Client					
Name	Example Client		Contact	Carl Cameron	
Type	Client		Phone	09 123 4567	Fax 09 234 5678
Address	123 Adventure Avenue		Mobile	021 123456	
	Papatoetoe		E-mail	carl@exampleclient.com	
	Auckland	2014	GST #	123456	A/C # 10000
Sales Rep	Sally Salesperson		Fuel %	Cheap FAF (4.00%)	
Auto Docket	<input type="checkbox"/> Prefix <input type="button" value="Start"/> <input type="button" value="End"/>		Disable	<input type="checkbox"/>	Company Code EXAMPLECLIENT
Booking Memo			Rate Master	0	
Stop Credit	<input checked="" type="checkbox"/>		Booking Alert	<input type="checkbox"/>	
			Added: 2016-08-10 13:16:22		
			69678		
			<input type="button" value="Delete"/> <input type="button" value="Clear"/> <input type="button" value="Save"/>		

When to use Autodocketing

If you use or supply pre-printed docket books for all of your clients auto docketing should not be enabled and docket numbers should be entered manually into the docket field for each booking. If a specific client is using pre-printed docket books then disable auto docketing for this client.

Auto Docket Check box

Enables/ Disables auto docketing. When a job is booked for a client who has auto docketing enabled the word **AUTO** will appear in the docket field and once the job is saved it will be automatically generated.


Container Booking
✕

Freight Payer

Pickup Ref
Order Ref
Delivery Ref

Docket

STATUS:
Quote: ☐
No D: ☐

Container

☒ IMP ☐ EXP ☐ Move

☒ Full ☐ Empty

Weight (kgs)

☒ 10ft ☐ 20ft ☐ 40ft ☐ 45ft

Type

Commodity

DG's ☐

Vessel:

Voyage

Release No

Pin

Random

Hold Release

VBS Slot Ref. / Time

General
Comments
Port Info.
Costs & Charges

NEW

Auto Docket Prefix

A unique code that will be prefixed to this client's automatically created docket numbers. If this field is left blank the client will share a docket number range with any other client whom has auto docketing enabled and no prefix. It is preferred that all clients have a unique prefix as there is a performance cost if they do not.

Details
Places
Profile
✕

Company

Name

Type

Address

Sales Rep

Auto Docket ☒

Booking Memo

Stop Credit ☒ **Booking Alert** ☐

Contact

Phone **Fax**

Mobile

E-mail

GST # **A/C #**

Fuel %

Disable ☐ **Company Code**

Rate Master


Added: 2016-08-10 13:16:22

69678

🗑 **Delete**

🗑 **Clear**

💾 **Save**


Container Booking

Freight Payer

Example Client

Pickup Ref

Order Ref

Delivery Ref

Docket

TEST

AUTO

STATUS:

Quote: ☐

No D: ☐

Container

☐ IMP
 ☐ EXP
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Type

GP

Commodity

DG's ☐

Vessel:

Voyage

Release No

Pin

Random

Hold Release

VBS Slot Ref. / Time

General

Comments

Port Info.

Costs & Charges

NEW

Auto Docket Start

The number at which auto docketing will start from. This feature is only available if a prefix has been entered, otherwise the starting docket number will be assigned by iCOS LIVE.

Details

Places

Profile

Company

Example Client

Name

Example Client

Type

Client

Address

123 Adventure Avenue

Papatoetoe

Auckland

2014

Sales Rep

Sally Salesperson

Auto Docket

☒

TEST

1000

End

Booking Memo

Stop Credit ☒

Booking Alert ☐

Contact

Carl Cameron

Phone

09 123 4567

Fax

09 234 5678

Mobile

021 123456

E-mail

carl@exampleclient.com

GST #

123456

A/C #

10000

Fuel %

Cheap FAF (4.00%)

Disable ☐

Company Code

EXAMPLECLIENT

Rate Master

0



Added: 2016-08-10 13:16:22

69678

Delete

Clear

Save

**Bulk Booking**

Customer:

Docket:

Quote ☐

Order Number:

Pickup Ref:

Delivery Ref:


No Disp ☐

Pickup

Dropoff

Auto Docket End

The number at which auto docketing will end

 This feature is depreciated and should not be used

Preview