Bulk Booking

Modified on: Wed, 16 Jan, 2019 at 3:21 PM

Opening the Bulk Booking dialogue

1. Open the **Dispatch** menu
2. Select **Bulk Booking**

Internal users require the **Dispatch Role** and the **Bookings - Bulk** task to access this dialogue

Creating a Bulk Booking

Selecting a Freight Payer

The freight payer is the client that will be billed for the booking when invoiced

1. Select a client from the **Customer** drop down

Only internal users and the freight payer you selected will be able to see this booking

Booking References

2.
   a. If the selected client has **Auto Docketing** disabled, optionally enter a docket/ consignment number.
   b. If the selected client has **Auto Docketing** enabled, the docket number will be automatically entered when the booking is saved

3. Optionally enter the client's reference for this booking into the **Order Reference** field
4. Optionally enter the pickup site's reference into the **Pickup Reference** field
5. Optionally enter the delivery site's reference into the **Delivery Reference** field

Pickup and Drop-off sites

Bulk bookings have two predefined sites for Pickup and Dropoff. Adhoc movements in between these sites can be added later during allocation to your vehicles.

Sites can be entered free form or selected from previous entries in a booking, or from the **Places** dialogue found under the **Super User** menu.

When a site is created it is stored and linked to the client you've selected as the freight payer. As you start typing a site's name you will be presented with an auto-complete drop down list containing previous entries that have been linked to this client.

6.
    a. Enter the Pickup site's name into the first text field
    b. Enter the date and time that you need to be onsite
    c. Optionally enter the street address into the first address line
    d. Optionally enter secondary address information into the second address line
    e. Optionally enter tertiary address information into the third address line
    f. Start entering the site's suburb or city into the fourth address line. A drop down will appear containing locations that match and   the more you type the more relevant they will become.

7. Repeat the above steps for the Drop-off site.

The last address line of a site is used for rating purposes so it is important that you are as specific as possible

Line Items

Goods are added to bookings as line items and can be automatically rated using **Commodities** (rate cards).

A line item can be added per shipped item (i.e. "Palm Kernal", "Gravel", "Mollasses") or for a group of goods that are rated the same way (i.e. "Tonnes", "Cubic").

Commodities can be called anything you like but are usually named in a manner relevant to how the line item is rated. Simple and coherent commodity names will ensure internal users and clients who book online pick the correct option.

Line items that use the same **Commodity** are rated together.

It is likely that you have no **Commodities** setup yet so you will be manually rating your first booking.

Creating a line item

8.
    a. Enter the **quantity** of goods(must be 1 or higher and cannot include decimal places)
    b. Optionally enter a **reference** for the line item (i.e. The purchase order number from a Quarry, or even the person paying for the goods)
    c. Optionally enter a **description** of the goods
    d. Optionally enter the good's **weight** in kilograms
    e. Optionally enter the good's **cubes**
    f. Click the **Add** button

9. Repeat the above steps and add 3 more line items

Updating a line item

10.
    a. Click the **pencil** icon of one of the line items you created in the above steps
    b. Change some of the line item's details (they will appear in the same location you originally entered them)
    c. Click the **update** button to apply the changes

Deleting a line item

11. Click the **Red Cross** icon on one of the line items you created in the above steps

Notes and Comments

The **Notes & Comments** tab allows you to record optional instructions or notes. These notes are free-form and can be changed at any stage of a job's life and are displayed on any consignment notes created from the system. Certain key words will trigger icons to show in the **Flags** column for this job on your dispatch workbench:

- **Any notes** trigger a blue asterisk icon
- The word **CALL** triggers an orange telephone icon
- The word **URGENT** triggers a red clock

12.
    a. Click the **Notes & Comments** tab
    b. Optionally enter comments that both internal users and the freight payer can see.
    c. Optionally enter comments that only internal users can see

13. Optionally select an option from the **Goods Type** drop-down
14. Optionally enter the temperature the goods must be stored at in the **Req Temp** field

Rating

A booking's cartage charge is calculated in three ways:

- Auto-rated when commodities are supplied
- Manually rated
- Set as no charge by ticking **No Chg**

For this exercise you will manually rate the booking.

15.
    a. Tick **Rate Override**

b. Manually enter a cartage charge

Saving your booking

16. Click **Save Booking**

Once your booking has been successfully saved it will go into View Mode. This layout is the same that you will see when a freight booking has been opened from your **Dispatch workbench.**
if **auto docketing** is enabled for the freight payer then the docket number will now be generated.

When a booking is in it's **View Mode** more options become available on the **details tab** and a **quick actions** drop down will appear. For more information see the articles on these topics in the current chapter

Preview