

# Freight Booking

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## Opening the Freight Booking dialogue

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

**Zoom:** ([http://icoslive.screenstepslive.com/s/15520/m/59221/l/667602-freight-booking/show\\_image?image\\_id=1176526](http://icoslive.screenstepslive.com/s/15520/m/59221/l/667602-freight-booking/show_image?image_id=1176526)).

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

## Creating a Freight 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 **Freight Payer** drop down

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

If you have no clients created please read the **Client** chapter's article: **Creating, Modifying and Disabling a Client Company Record**

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

5. Optionally enter the delivery site's reference into the **Delivery Reference** field

## Shipper and Consignee sites

Freight bookings have two predefined sites for Shipper and Consignee. (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 so that you can use it again later without having to type it out again.

As you start typing a site's name you will be presented with an auto-complete drop down list containing any previous entries that have been linked to this client which begin with the letters you have typed.

7. Enter the Shipper's site name into the first text field

8. Optionally enter the street address into the first address line

9. Optionally enter secondary address information into the second address line

10. Optionally enter tertiary address information into the third address line

11. 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.

12 - 16. Repeat the above steps for the Consignee.

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. "Couch", "Desk", "Chair") or for a group of goods that are rated the same way (i.e. "Bulk Freight", "Miscellaneous goods").
- **Commodities** can be called anything you like but are usually named in a manner relevant to how the line item is rated (i.e. "Weight", "Cubes", "Each", "Pallet", "Carton" etc.).
- 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.
- If no **Commodities** have been setup your booking can be manually rated with the "**Rate Override**" option

### Creating a line item

17. Enter the **quantity** of goods(must be 1 or higher and cannot include decimal places)

18. Optionally select how the goods are **packaged**

19. Optionally enter a **description** of the goods

20. Optionally enter the good's **weight** in kilograms

21. Optionally enter the good's **cubes**

22. Click the **Add** button

23. Repeat the above steps for each item in the job

Updating a line item

24. Click the **pencil** icon of one of the line items you created in the above steps

25. Change some of the line item's details (they will appear in the same location you originally entered them)

26. Click the **update** button to apply the changes

## Deleting a line item

27. 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 freeform 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

28. Click the **Notes & Comments** tab

29. Optionally enter comments that both internal users and the freight payer can see.

30. Optionally enter driver instructions that only internal users and drivers can see

## Service Type

Service types are an *optional* feature which allows users to define the type of freight service that should be provided.

There are four service types for freight bookings:

- **Economy**
- **Standard** (default option)
- **Express**
- **Urgent**

Service types allow you to create multiple versions of the same commodity but at different rates.

For example you could have a commodity called "Weight" which charges:

- \$10 at an Economy rate
- \$20 per kilogram at a standard rate
- \$30 per kilogram at an express rate

- \$40 per kilogram at an urgent rate

31. Optionally select a **Service Type**

## Pallets and Lifts

- 32.
- Optionally enter how many hire pallets there are for this booking
  - Optionally enter how many non-hire pallets there are for this booking
  - Optionally enter how many lifts are required for this booking
  - Optionally enter how many hire pallets that are expected to be returned

## Temperature

The goods type and required temperature fields allow you to identify if the booking's goods have specific storage requirements. There are three goods types:

- **AMBIENT**
- **CHILLED**
- **FROZEN**

If a freight payer's goods are always of a particular type with specific temperature requirements they can be set as defaults in their **Profile** tab in the **Client Maintenance** screen.

- 33.
- Optionally select an option from the **Goods Type** drop-down
  - Optionally enter the temperature the goods must be stored at in the **Req Temp** field

## Pickup and Delivery Dates

- 34.
- Enter the date and time the goods need to be picked up into the **Required Pickup** fields
  - Enter the date and time the goods need to be delivered into the **Required Delivery** fields

## 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.

35.

- a. Tick **Rate Override**
- b. Manually enter a cartage charge

## Saving your booking

36. 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