



USER'S GUIDE

Descartes® Dock Appointments Scheduling™

20.06.0100

July 2020

© 2020 The Descartes Systems Group Inc. All rights reserved.

Information in this document is subject to change without notice. Descartes makes no warranties, express or implied, in respect of this document or its contents.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of The Descartes Systems Group Inc. ("Descartes").

Descartes may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Descartes, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

Descartes Dock Appointments Scheduling, Descartes Yard Management, Descartes Global Logistics Network (GLN), Descartes, the phrase "Helping Customers Deliver," and the Descartes logo are either registered trademarks or trademarks of Descartes and/or its affiliates.

The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Descartes® Dock Appointments Scheduling™

20.06.0100

The Descartes Systems Group Inc.

120 Randall Drive

Waterloo, Ontario Canada, N2V 1C6

Phone: 519-746-8110

Internet: <http://www.descartes.com>

Customer Support

In North America: 1-877-786-9339

Outside North America: +800 -7866-3390

e-mail: servicedesk@descartes.com

Table of Contents

| | |
|---|-----------|
| Welcome to Descartes® Dock Appointments Scheduling™ | 9 |
| Features | 9 |
| Benefits | 9 |
| Learning to Use Descartes Dock Appointments Scheduling | 10 |
| Descartes Dock Appointments Scheduling Getting Started Guide | 10 |
| Descartes online help | 10 |
| About This Guide | 10 |
| Document Conventions | 10 |
| User Types | 12 |
| DC Admin | 12 |
| Coordinator | 13 |
| Coordinator/YM | 14 |
| Carrier | 15 |
| Supplier | 16 |
| Check-in | 16 |
| View Only | 17 |
| Templates | 18 |
| Descartes Dock Appointments Scheduling Dashboard | 19 |
| Configuring the Dashboard Inbox | 19 |
| Setting Email Preferences | 21 |
| Sending Email Notifications to All Suppliers and Carriers | 22 |
| Understanding Appointments | 24 |
| Appointment Process for a DC with Auto-Scheduling | 30 |
| Viewing Appointments | 30 |
| Standing Appointments | 30 |
| Created (Draft) Appointment Requests | 31 |
| Submitted Appointment Requests | 31 |
| Refused/Cancelled Appointment Request | 31 |
| Approved Appointments | 32 |
| Arrived Appointments | 32 |
| Departed Appointments | 32 |
| No Show/Delivery Failure Appointments | 33 |
| Viewing Trailer Arrival/Departure Timestamp Data from Appointment Lists | 33 |
| Viewing Edited Trailer Arrival/Departure Values | 35 |

- Viewing Appointment Details 37
- Viewing Appointment History 40
- Searching Appointments 41
- Printing an Appointment 43
- Configuration and Display of Hot Appointments 43
 - Appointment Details: Marking Hot Appointments at the Header and Line Level 43
 - Viewing Hot Appointments on List Pages 45
- Understanding Door Assignments 47**
 - Viewing Door Assignments 48
 - Approving an Appointment 51
 - Rescheduling an Appointment 53
- DA Admin Tasks 55**
 - Setting Up Global Notifications 55
 - Creating Global Notifications 55
 - Editing Global Notifications 58
 - Receiving Messages 58
 - Resubmitting Failed Appointment Email Notifications 60
 - Resubmitting Approved Appointments for Alternate Requested Date/Time 61
 - Using the Import Carriers/Suppliers Feature 63
 - Moving Party Data from One Environment to Another 65
- DC Admin Tasks 68**
 - Creating a Distribution Center 68
 - Managing Exclusive Destination DCs (Template-C) 71
 - Door Schedule Setup 74
 - Configuring Auto-Scheduling Setup 75
 - Cross Dock Setup (Template-M) 78
 - X-Dock Sorter Setup 79
 - Viewing X-Dock PO Lines on an Appointment 81
 - Auto-Scheduling of X-Dock Units 81
 - X-Dock Auto-scheduling Examples 83
 - Creating a Carrier 89
 - Service Level Specification Per Carrier 91
 - Creating a Supplier 92
 - Merging Suppliers 95
 - Setting In-Transit Time for Suppliers 97
 - Setting Up New Users for the Parties 98

- Setting a Carrier or Supplier User as Party User Admin 99
 - Designating Supplier/Carrier Users as Party User Admins..... 100
- Configuring Global Settings..... 102
 - Template-C Global Settings..... 102
 - Template-M Global Settings 114
 - Template-W Global Settings..... 124
- Setting Up Global Hours/Holidays..... 129
- Setting Party Relationships 134
- Viewing and Editing a DC, Carrier or Supplier..... 136
- Editing Relationships from the DC, Carrier or Supplier List Page 136
- Deleting Users from a DC, Carrier or Supplier 137
- Deleting a DC, Carrier or Supplier 138
- Reinstating a Deleted DC, Carrier or Supplier 140
- Importing and Exporting Distribution Centers 140
- Standing Appointments Shells Instant Approval Functionality 143
- Registering a Carrier for Self-Registration 144
- Acknowledging Appointment Cancellation by Carrier or Supplier..... 144
 - Acknowledging an Appointment Cancelled by Carrier/Supplier 145
 - Inbox Preference Setting 150
 - Global Settings..... 151
 - Dashboard Filter 151
- Carrier and Supplier Tasks 152**
 - Creating an Appointment Request..... 152
 - Template-C Process 153
 - Template-M Process..... 160
 - Template-W Process 165
 - Using the Advanced PO Search 168
 - Updating an Appointment Request 169
 - Updating Approved Appointment Requests 171
 - Template-C: "N" Column Functionality for DC Users 172
 - Template-M: Appointment Merging During Concurrent Updates 173
 - Cancelling an Appointment Request 175
 - Viewing Carrier Details 176
 - Working with Appointment Advices 176
 - Creating an Appointment Advice 179
 - Viewing Appointment Advices 180
 - Creating Appointments from Advices 181

- Adding Appointment Advices to an Appointment 181
- Managing Users as a Party User Admin 183
 - Adding a User 183
 - Editing a User 184
 - Removing a User..... 184
- Carrier Self-Registration Process 184
 - Registering a New Carrier 185
 - Carrier Self Registration..... 187
 - Identifying Self-Registered Carriers 188
- Coordinator Tasks..... 189**
 - Creating a Standing Appointment..... 189
 - Showing Related Standing Appointments..... 191
 - Approving Appointment Requests 191
 - Approving an Appointment 191
 - Approving as a Standing Appointment 193
 - Template-C: Editing Trailer Arrived/Departed Fields 194
 - Trailer Icons on List Pages..... 199
 - Refusing an Appointment Request 200
 - Rescheduling an Appointment..... 200
 - Cancelling an Appointment 202
 - Deleting an Appointment 202
 - Viewing Door Assignments 203
 - Viewing Distribution Center Details..... 206
 - Viewing Carrier Details 206
 - Viewing Supplier Details 206
 - Registering a Carrier for Self-Registration 207
- DC Check-in User Tasks..... 208**
 - Checking In/Out an Appointment 208
 - Moving an Appointment to No Show/Delivery Failure..... 210
 - Selecting Reason Code 210
- Appendix A: Using a Quadrant Page 212**
 - Modifying Quadrants 212
 - Refreshing Data 216
- Appendix B: Available Commands by User and Appointment Status 217**
 - DC Admin and Coordinator Users 217
 - Appointment Request List Pages 217

| | |
|--|------------|
| Appointment Request Forms..... | 219 |
| Appointment Advice List Pages | 223 |
| Appointment Advice Request Form..... | 224 |
| Appointment Options on Door Assignments Page | 226 |
| Standing Appointments List Pages..... | 227 |
| Standing Appointment Request Forms | 227 |
| Carrier Users | 228 |
| Appointment Request List Pages | 228 |
| Appointment Request Forms..... | 229 |
| Appointment Advice List Pages | 231 |
| Appointment Advice Request Form..... | 232 |
| Supplier Users | 233 |
| Appointment Request List Pages | 233 |
| Appointment Request Forms..... | 234 |
| Appointment Advice List Pages | 236 |
| Appointment Advice Request Form..... | 237 |
| Appendix C: Update or Resubmit Appointments Via API..... | 239 |
| Identifying Externally Submitted Appointments in the User Interface..... | 241 |
| Appendix D: Resetting a User Password by Email | 248 |
| Configuration | 248 |
| Customizing Emails with Text Keys..... | 249 |
| Resetting a Password | 251 |
| Appendix E: Text-Key Definitions..... | 254 |
| Text-Keys Related to Exclusive Destinations | 254 |
| Text-Keys Related to PO Validation Codes | 255 |
| Text-Keys Related to Standing Shell Auto-Generation..... | 257 |
| Text-Keys Related to Cut-Off Time Functionality | 258 |
| Text Keys Related to Appointment Merge Functionality..... | 259 |
| Text Keys Related to Party Admin User Messages | 259 |
| Appendix F: Configuring Approved Resubmission Functionality | 260 |
| Configuring Critical Fields and Non-Critical Fields | 260 |
| Customizing Warning Message Templates | 261 |
| Appointment Version Conflict Message Template | 261 |
| Critical Field Change Message Templates..... | 261 |
| Non-Critical Field Change Message Templates..... | 264 |
| Message Template Parameters | 265 |

Customizing Fields Names in Generic Error/Warning Messages 266

Customizing New Fields Added to the ApptResubmitFields List..... 267

Appendix G: Configuring Fields Via SELECT Profile Items (Template-M).. 268

Configuring Required Fields for Selected Purchase Orders 268

 Customizing the Validation Message..... 269

Configuring Read-only Override Fields for Selected Purchase Orders 270

Adding NumCasesShipped Field to Appointment Form Via Profile Item 271

Configure Parameterized and Text-key Translatable [Comment] Field 271

 Comment 272

 CommentTextKey..... 272

 CommentParam1, CommentParam2, CommentParam3, ...CommentParamN 273

Definition of PO-specific Date Range and Tolerance Level..... 274

Standardized 'Remaining Quantity' Calculation 274

SupplierLocationID and UserID for Validation on Multiple PO Entry 275

Enable Supplier-Level Delivery Tolerance..... 275

Welcome to Descartes® Dock Appointments Scheduling™

The goal of Descartes Dock Appointments Scheduling is to optimize receiving operations for inbound shipments to a distribution center (DC) or warehouse. Best practices for receiving operations include establishment of appointments (reservations) for deliveries and improving knowledge of what is arriving (the contents of the deliveries). Many DCs may implement a policy requiring pre-approved appointments for each delivery. Descartes Dock Appointments Scheduling provides a collaborative tool to create and approve delivery appointments for use by carriers, suppliers and distribution center personnel. Descartes Dock Appointments Scheduling is built to minimize data entry and optimize data quality. This is accomplished by interfaces to the Descartes Visibility and Event Management™ product to validate and lookup information from purchase orders and through a flexible, configurable web interface.

Features

- Enables collaboration between shippers, consignees and carriers
- Streamlines the manual processes associated with appointing
 - Intuitive screen layout
 - Minimal data entry
- Automated, configurable notifications as appointments are requested, scheduled and rescheduled
- Optimizes data quality and visibility to inbound receipts
- Enables compliance reporting and score-carding of the receiving process

Benefits

- **Improve Inventory Turns**
 - Ensure that goods are scheduled for delivery on days where the goods can be received promptly
 - Optimize receipt of goods related to promotions in a timely manner
- **Address Hours of Service**
 - Reduce wait time for load/unload activities
 - Reduce detention charges
- **Improve Warehouse Efficiency**
 - Optimize peak labor needs through better allocation of appointments within regular working hours. Review put-away needs by appointments to plan ahead. Enable prioritization of receipts and pickups ensuring that scarce resources are used effectively.
- **Automate the collection of data**
 - Gain management insight into bottlenecks and trading partner compliance
 - Analyze operations for process improvement opportunities

Learning to Use Descartes Dock Appointments Scheduling

Descartes Dock Appointments Scheduling Getting Started Guide

This guide is subject to the proviso that users are authorized, registered and connected Descartes Dock Appointments Scheduling users. This guide is intended to introduce novice and intermediate users to the LNOS user interface, as well as, facilitate navigation and performance of basic tasks within the application.

Descartes online help

Online help provides users with an understanding of how to use the features and functions of Descartes Dock Appointments Scheduling. To receive the maximum benefit from the online help, ensure that users are familiar with the basic tasks covered in the *Descartes Dock Appointments Scheduling Getting Started Guide*.

About This Guide


The tasks covered in this guide focus on the features and functionality broken down by user tasks within Descartes Dock Appointments Scheduling and include:

- Overview of user roles
- Overview of Descartes Dock Appointments Scheduling Dashboard
- Overview of appointments
- DC Admin tasks
- Carrier and Supplier tasks
- Coordinator tasks
- DC Check-in tasks

Document Conventions

This document uses the following conventions:

- Names of windows, frames, dialogs, menus, list boxes and lists begin with uppercase and are bolded. (**Tools** menu, **Save** button)
- Key combinations that you press appear in mixed case. If the keys are joined by a plus sign (+), press and hold the first key simultaneously with the remaining keys (for example, Ctrl+Alt+Del).
- Text that you type appears in `Courier New` font. (Enter `USERID` in the login field.)
- Cross-references to other documents, or to sections within the current document, appear in underlined italics. (See *[Saving a File](#)* for details.)
- *Italics* are used for emphasis throughout this document.

 **Note**— Information important to a particular task or function is introduced with the note format and icon.

- ① **Tip**— Information that may make completing a task easier, but isn't essential to the task, is introduced with the tip format and icon.
- ⚠ **Warning**— **This warning format indicates information that you need to pay particular attention to. Ignoring information presented as a warning could lead to damage and unexpected results. Disregarding information presented as a warning may result in damage to your software or data.**

User Types

There are six types of users in Descartes Dock Appointments Scheduling. Each user type has tasks relevant to that particular login based on a set of predefined roles assigned to the type, i.e. when a new user is created and assigned, it comes preloaded with user roles allowing the user access to certain tasks in the system.

The six user types are:

- DC Admin User
- Coordinator User
- Carrier User
- Supplier User
- Check In User
- View Only User

The DA Admin is a global super user with access to all data and functions in the system.

All users can perform the following tasks:

- View appointments
 - ➡ **Note**— Users can only view the appointments that they are authorized to see.
- Search appointments
- Print the following appointments:
 - Created (Draft)
 - Submitted
 - Refused/Cancelled
 - Approved
 - Arrived
 - No Show/Delivery Failure
 - ➡ **Note**— “No Show” status is called “Delivery Failure” in certain templates of Descartes Dock Appointments Scheduling. See the [Templates](#) section for more information on templates.
 - Departed

DC Admin

A DC Admin user can perform the following tasks, restricted to appointments and other data in his or her related distribution center:

- Set up Distribution Centers (DC's), Carriers, Suppliers and Global Settings
- Set up users for the parties (DC's, Carriers and Suppliers)
- View DC's, Carriers and Suppliers information

- Delete users from DC's, Carriers and Suppliers
- Delete DC's, Carriers and Suppliers
- Perform all tasks that a Coordinator user can perform

Coordinator

A Coordinator user can perform the following tasks:

- Create regular and standing appointments
- View door assignments
- View Distribution Center, Carrier and Supplier details
- View appointments including door assignment and additional order information
- Manually Approve the following appointments:
 - Created (Draft)
 - Submitted
- Refuse submitted appointments
- Cancel the following appointments:
 - Submitted
 - Approved
 - Arrived
 - No Show/Delivery Failure
- Delete the following appointments:
 - Standing
 - Created
 - Submitted
 - Refused/Cancelled
 - Approved
 - Arrived
 - Departed
 - No Show/Delivery Failure
- Submit the following appointments:
 - Created
 - Refused/Cancelled
- Reschedule the following appointments:
 - Standing
 - Approved
 - No Show/Delivery Failure
- Show related appointments for standing appointments
- Check in/out the following appointments:

- Approved
- Arrived
- No Show/Delivery Failure
- Undo Check out the following appointments:
 - Departed
- Move the following appointments to No Show/Delivery Failure:
 - Approved
 - Arrived

Coordinator/YM

Users of this type can perform the tasks of both the Coordinator and YM Shipping Receiving user types. With this user type, DC Admin users can assign all rights to a user without the need to log in as a user administrator to add specific Descartes Yard Management™ permissions to a Coordinator user.

- Create regular and standing appointments
- View door assignments
- View Distribution Center, Carrier and Supplier details
- View appointments including door assignment and additional order information
- Manually Approve the following appointments:
 - Created (Draft)
 - Submitted
- Refuse submitted appointments
- Cancel the following appointments:
 - Submitted
 - Approved
 - Arrived
 - No Show/Delivery Failure
- Delete the following appointments:
 - Standing
 - Created
 - Submitted
 - Refused/Cancelled
 - Approved
 - Arrived
 - Departed
 - No Show/Delivery Failure
- Submit the following appointments:
 - Created

- Refused/Cancelled
- Reschedule the following appointments:
 - Standing
 - Approved
 - No Show/Delivery Failure
- Show related appointments for standing appointments
- Check in/out the following appointments:
 - Approved
 - Arrived
 - No Show/Delivery Failure
- Undo Check out the following appointments:
 - Departed
- Move the following appointments to No Show/Delivery Failure:
 - Approved
 - Arrived
- Arrive and depart trailers
- Move and update trailers
- View trailer details and history

Carrier

A Carrier user has access to appointment requests that identify the respective carrier in the request header and can perform the following tasks:

- View Carrier details and add more Carrier terminals
- Create appointment requests
- Create appointment requests against standing appointments
- View appointment progress without access to door assignment and additional order information
- Submit the following appointments:
 - Created (Draft)
 - Refused/Cancelled
- Re-submit the following appointments with a new date or changed contents:
 - Refused/Cancelled
 - Approved
 - No Show/Delivery Failure
- Cancel the following appointments:
 - Submitted
 - Approved

- Arrived
- No Show/Delivery Failure

Supplier

A Supplier user has access to appointment requests that identify the respective supplier in the request header. For certain clients, Supplier users also have access to appointments when specified at the appointment line item level. Supplier users can perform the following tasks:

- View Supplier details and add more Carrier terminals from the **Appointment Request** page
- Create appointment requests
- Create appointment requests against standing appointments
- View appointment progress without access to door assignment and additional order information
- Submit the following appointments:
 - Created (Draft)
 - Refused/Cancelled
- Re-submit the following appointments with a new date or changed contents:
 - Refused/Cancelled
 - Approved
 - No Show/Delivery Failure
- Cancel the following appointments:
 - Submitted
 - Approved
 - Arrived
 - No Show/Delivery Failure

Check-in

The Check-In user is assigned to a DC. A Check-In user can perform the following tasks:

- View door assignments
- Check In/Out the following appointments:
 - Arrived
 - No Show/Delivery Failure
- Undo Check-Out of the following appointments:
 - Departed
- Move the following appointments to No Show/Delivery Failure:

- Approved
- Arrived

View Only

The View Only user is assigned by DC. A View Only user only has permission to view appointment across all statuses.

Templates

There are three templates in use for the Descartes Dock Appointments, Template-C, Template-M and Template-W, three “flavors” of the application, each configured to suit different client business models. For example, while some clients may wish users to add purchase orders to an appointment manually by entering a purchase order number in a free text field, others may want users to select from a prepopulated list of purchase orders.

The **Global Settings** page is adjusted for each template to show the setting relative to the current flavor of Descartes Dock Appointments, allowing administrators to create derivative appointment creation processes within a particular template. In Template-M, users can disable some of the default functionality, including the packaging override fields or the prepopulated PO#/ASN# dropdown lists, to adjust the appointment request submission process.

Templates allow this level of client customization within Descartes Dock Appointments without necessitating separate applications to be created.

Descriptions of the differing settings and appointment request processes are detailed in the [Configuring Global Settings](#), [Creating an Appointment Request](#) and [Viewing Appointment Details](#) sections of this document.

Descartes Dock Appointments Scheduling Dashboard

The Descartes Dock Appointments Scheduling Dashboard provides a summary panel of all appointments and the user's inbox which shows all appointments associated with the user's associated distribution centers (DCs), carriers and suppliers. Users can choose what statuses they want to see in their inbox. The DC Admin may pre-assign the types of appointments seen by each user, but all users can reconfigure their inbox.

Summary

Approval #

APPOINTMENT COUNT 26495

Created (Draft): 197

Advices: 2

Processed Advices: 91

Submitted: 1092

Refused/Cancelled: 13911

Approved: 7003

Arrived: 157

Delivery Failure: 4042

CREATE APPOINTMENT REQUEST

CREATE APPOINTMENT ADVISE

CREATE STANDING APPOINTMENT

VIEW DOOR ASSIGNMENTS

REGISTER NEW CARRIER

ASSIGN/UNASSIGN HOT POS

LEGEND

| | | | |
|--|--------------------------|--|-------------------|
| | Created | | Hot |
| | Submitted | | Re-Submitted |
| | Standing | | Approved |
| | Refused | | Cancelled |
| | Arrived | | Departed |
| | Delivery Failure | | Deleted |
| | Advices | | Processed Advices |
| | Request Contains Advices | | |
| | Recurring | | Printed |
| | Request Pending > 24 hrs | | |

DA Admin Inbox

Legend (Advices) : Missing Probill # with No Pickup Date Missing Probill # with Past Pickup Date

| Hot | Status | Request # | Reason Code | Last Modified On | DC | Probill # | Comments | PO # |
|-----|--------|-----------|------------------|----------------------|-------------|-----------|----------|----------------------------|
| | | 1632321 | | 2/27/2018 4:44:12 AM | DSG Test DC | | | test |
| | | 1632320 | | 2/21/2018 6:33:42 AM | DSGTestDC2 | | | DSGPO101813 |
| | | 1632319 | Received On Time | 2/26/2018 3:55:42 PM | DSG Test DC | | | DSGPO101813 DSGPO110513 |
| | | 1632318 | | 2/20/2018 8:40:52 AM | DSGTestDC5 | | | test |
| | | 1632317 | | 2/20/2018 8:38:23 AM | DSGTestDC5 | | | test |
| | | 1632316 | | 2/20/2018 4:18:27 AM | TestEmo | | 1. test | DSGPO101813 |

Rows 1 - 20 of 22 / Page 1 of 2 Rows per Page:10 / 20 / 50 Page 1 2

Users can right-click in the **Inbox** to display the right-click menu where they can configure the inbox and set the email preferences.

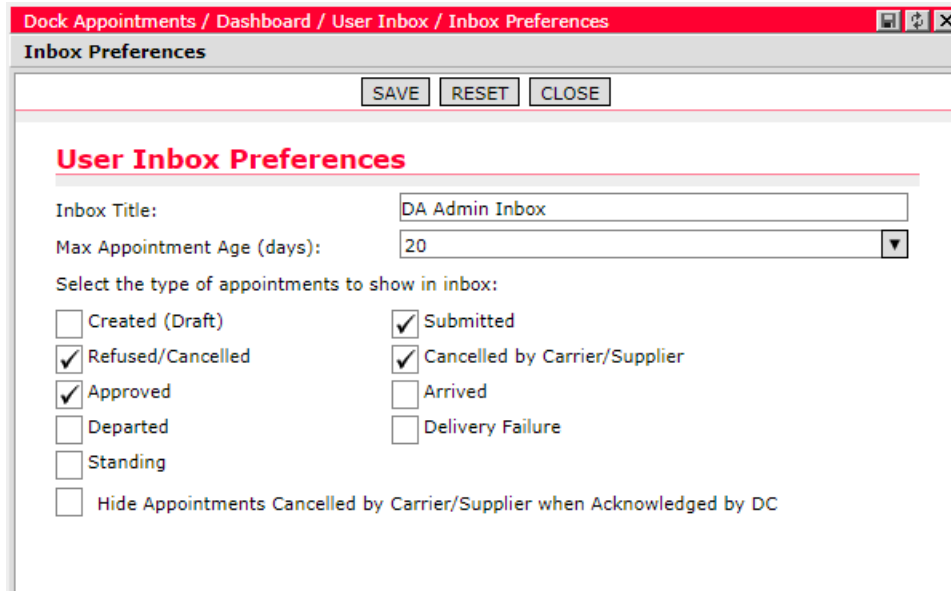
Configuring the Dashboard Inbox

All users can configure the inbox as to what types of appointments they want displayed in their inbox. See [Viewing Appointments](#) for more information on the types of appointments.

To configure your inbox:

- 1 From the main menu, select **Dock Appointments > Inbox Preferences**, or in the **Inbox** pane, right-click and select **Inbox Preferences** from the right-click menu.

The **Inbox Preferences** window displays.



- 2 In the Inbox Title field, enter an inbox title.
- 3 In the Max Appointment Age (days) field, select the maximum appointment age.
- 4 Select the type of appointments you want displayed in the inbox from the **Select the type of appointments to show in inbox:** checkboxes.
- 5 Click **Save**.

When Inbox Preferences are updated and saved, the default inbox settings configured on the **Global Settings** page by an administrator are overridden and no longer apply. Further, when an administrator makes changes to the default inbox settings, they will not apply to users who have updated their Inbox Preferences.

To return to the default settings and allow the administrator to manage inbox preferences in the future, click the **Reset** button.

- **Note**— When the **Inbox Preferences** window is displayed, users see the actual configuration used to select appointments for the user's **Dashboard**, regardless of whether the configuration is a default or a custom configuration. When you click **Save** on the **Inbox Preferences** window, a custom copy is created even if no modifications are made to the settings, which means that the default inbox preferences no longer apply. For more information, please

see the Default Inbox Preferences description in the [Template-C](#), [Template-M](#) or [Template-W Global Settings](#) sections.

- ❗ **Tip**— Only choose to check out the type of appointments that you work with regularly to reduce clutter. For example, Carriers may want to see “Draft”, “Refused”, “Cancelled” and “No-Show” statuses on their dashboard, while Coordinators may want to see “Submitted” and “Cancelled” by Carrier/Supplier statuses.

Setting Email Preferences

Email Preferences determine what emails are sent to each user when an action occurs to an appointment. The DC Admin can initially set them for the users, but each user can redefine what they want to receive. For instance, if the email preference Send an email when... **an appointment request is approved** checkbox is selected, then when an appointment is approved, the user will receive an email notifying them that it has been approved.

Not every update will trigger a notification email, even when specified. To allow for multiple edits and to avoid numerous emails when updates occur in rapid succession, notifications under these circumstances are compiled and sent within a given time frame.

To set your email preferences:

- 1 From the main menu, select **Dock Appointments > Email Preferences**, or in the **Inbox** pane, right-click and select **Email Preferences** from the right-click menu.

The **Email Preferences** window displays.

Email Preferences

SAVE CLOSE

Email Address:

Send Email When...

- an appointment request is approved
- an appointment request is rejected
- an appointment request is cancelled
- an appointment request is submitted with PO warnings
- an appointment is re-scheduled
- an appointment is marked as no-show
- an appointment has arrived
- an appointment has departed
- a comment is added to the appointment by another party
- a appointment request is deleted
- CC on the appointment updates made by this party
- reminder e-mail 48 hrs before appointment time

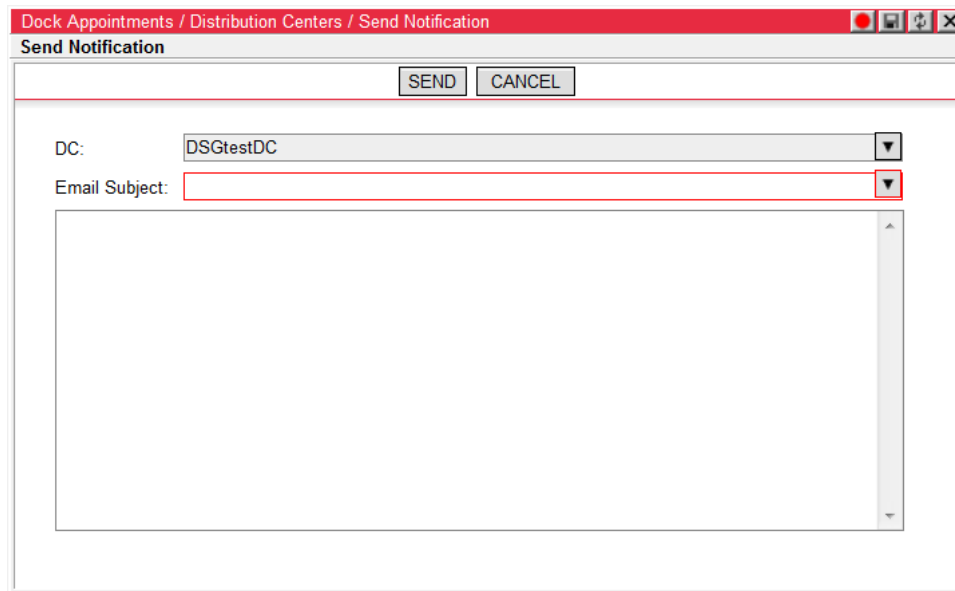
- 2 In the Email Address field, enter the email address you want notifications sent to when the action occurs.
- 3 Select the email preferences you desire from the **Send Email When** checkboxes. An email will then be sent to the email address specified above when the action occurs. For example, if you select **an appointment request is rejected**, then when an appointment request is rejected, you will be notified by email.
- 4 Click **Save**.

Sending Email Notifications to All Suppliers and Carriers

DC Admin users can broadcast email notifications to all suppliers and carriers to announce closures or other important information.

To broadcast an email notification:

- 1 Select **Dock Appointments Scheduling > Setup > Distribution Centers**. The DC list page appears.
- 2 Right-click on a DC and select **Send Notification** from the right-click menu. The **Send Notification** window appears.



The screenshot shows a 'Send Notification' dialog box. At the top, there is a red title bar with the text 'Dock Appointments / Distribution Centers / Send Notification'. Below the title bar, there are two buttons: 'SEND' and 'CANCEL'. The main area of the dialog contains a 'DC:' dropdown menu with 'DSGtestDC' selected. Below that is an 'Email Subject:' dropdown menu with a red border. At the bottom of the dialog is a large text area for entering the notification body.

- 3 Select an Email Subject from the dropdown or create a new one by selecting **Other....**
- 4 Enter the body of the notification.
- 5 Click **Send** to broadcast the notification or **Cancel** to discard it.

Understanding Appointments

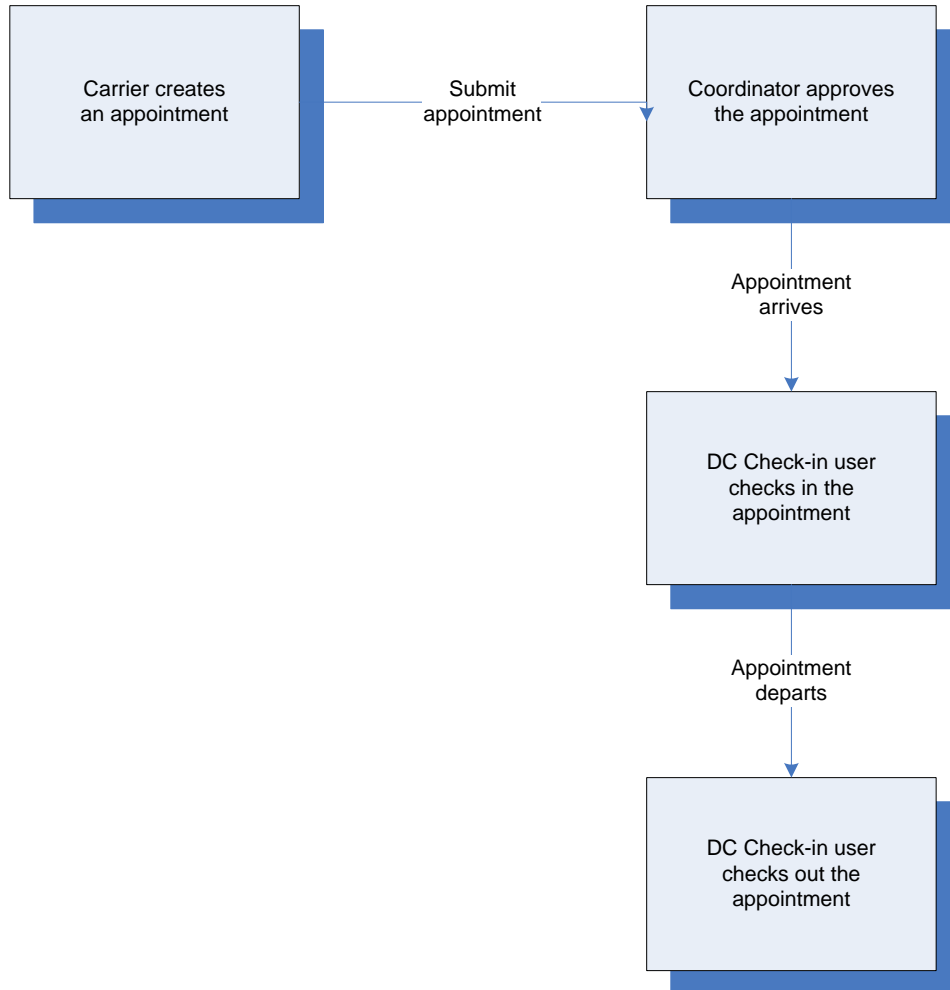
Appointments can be created as standing appointments or regular appointments requests.

Standing appointments are appointments that are reservations for future appointments. They reserve a block of time for a vendor delivery. Later, a Carrier can ask to deliver using one of these reserved times. Standing appointments do not require detailed data elements and are simple and fast to create. Standing appointments can only be created by a Coordinator.

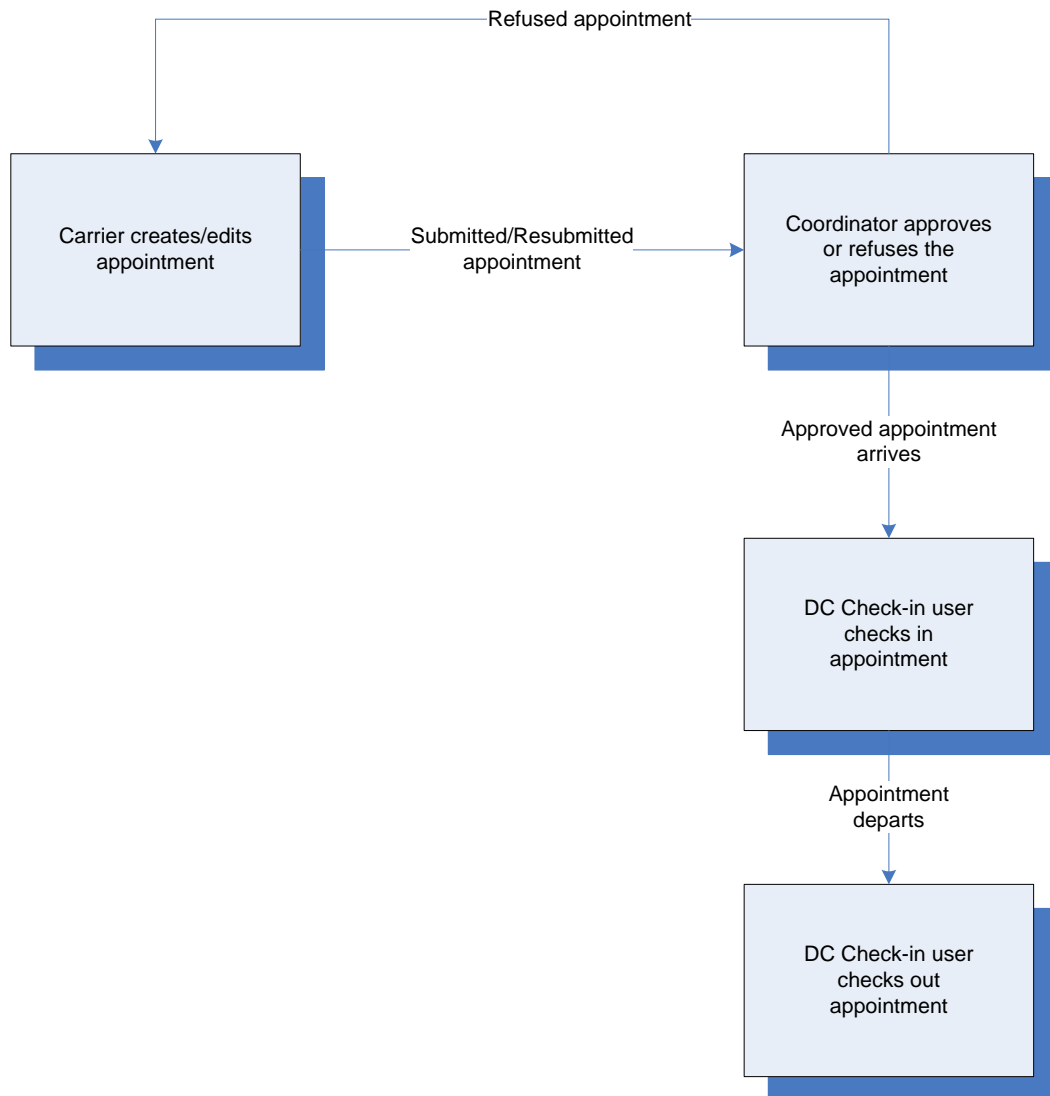
For instance, if a Supplier has appointments every Tuesday and Thursday at 7 a.m. until 9 a.m., the Coordinator can create a standing appointment to block out a certain door for those days at 7 a.m. Standing appointments are shown in light blue on the **Doors** page as shown in the example below, indicating a pre-booked slot.

The slot will change into a regular appointment color when a Carrier books an appointment request against this pre-booked slot. To do so, the Carrier checks the **Use standing appointment** checkbox while booking an appointment and selects the corresponding Supplier. If that Supplier has a standing appointment in the

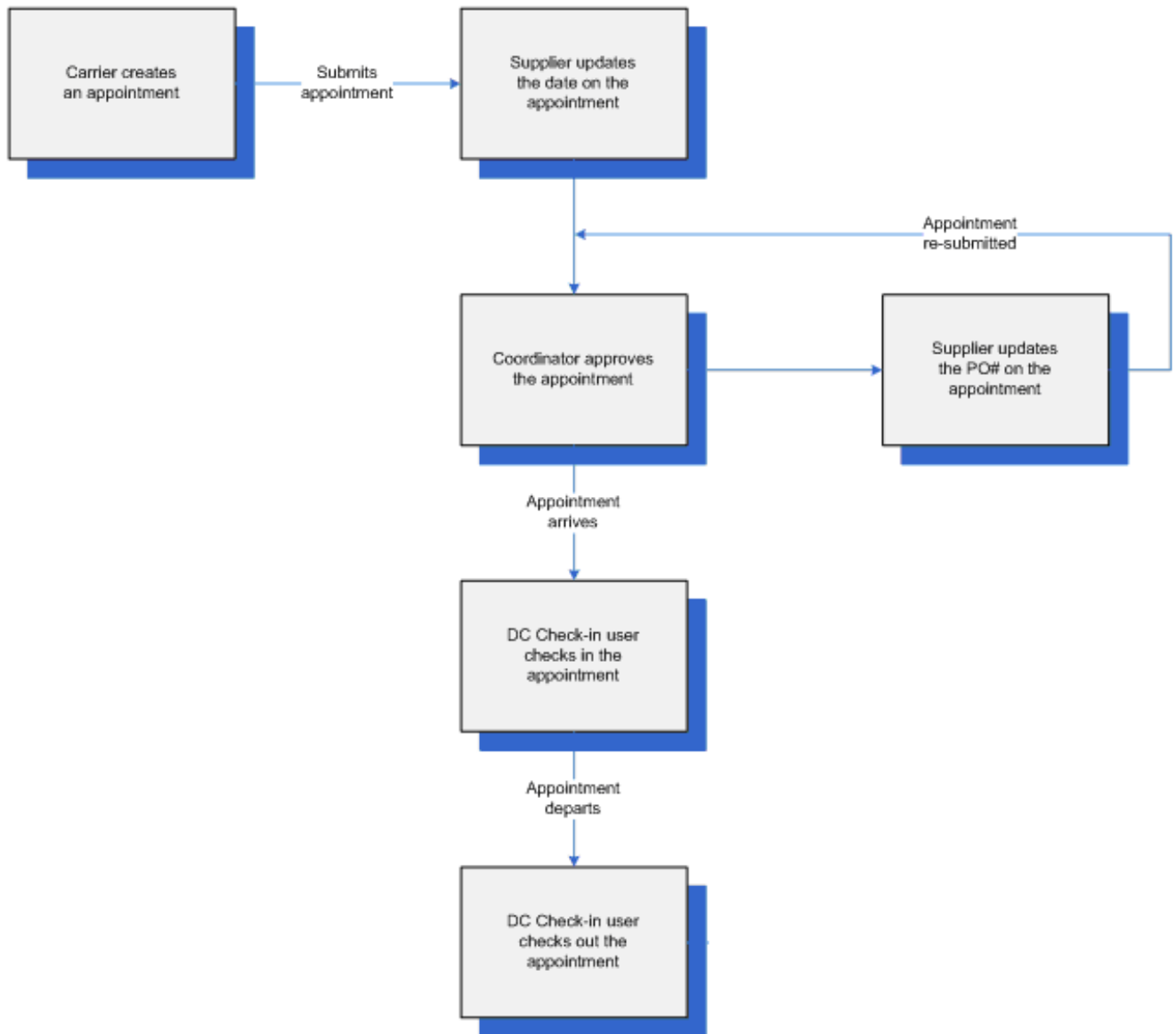
In Scenario one, for a DC where auto-scheduling is not setup, the Carrier creates an appointment and submits it to the Coordinator, who then approves the appointment. When the appointment arrives at the DC, the DC Check-in user checks the appointment in and checks it out after the carrier departs.



In Scenario two, for a DC where auto-scheduling is not setup, the Carrier creates an appointment and submits it to the Coordinator, who refuses the appointment. The Carrier then edits the appointment and resubmits it back to the Coordinator, who approves the changes. When the appointment arrives at the DC, the DC Check-in user checks the appointment in and checks it out after the carrier departs.



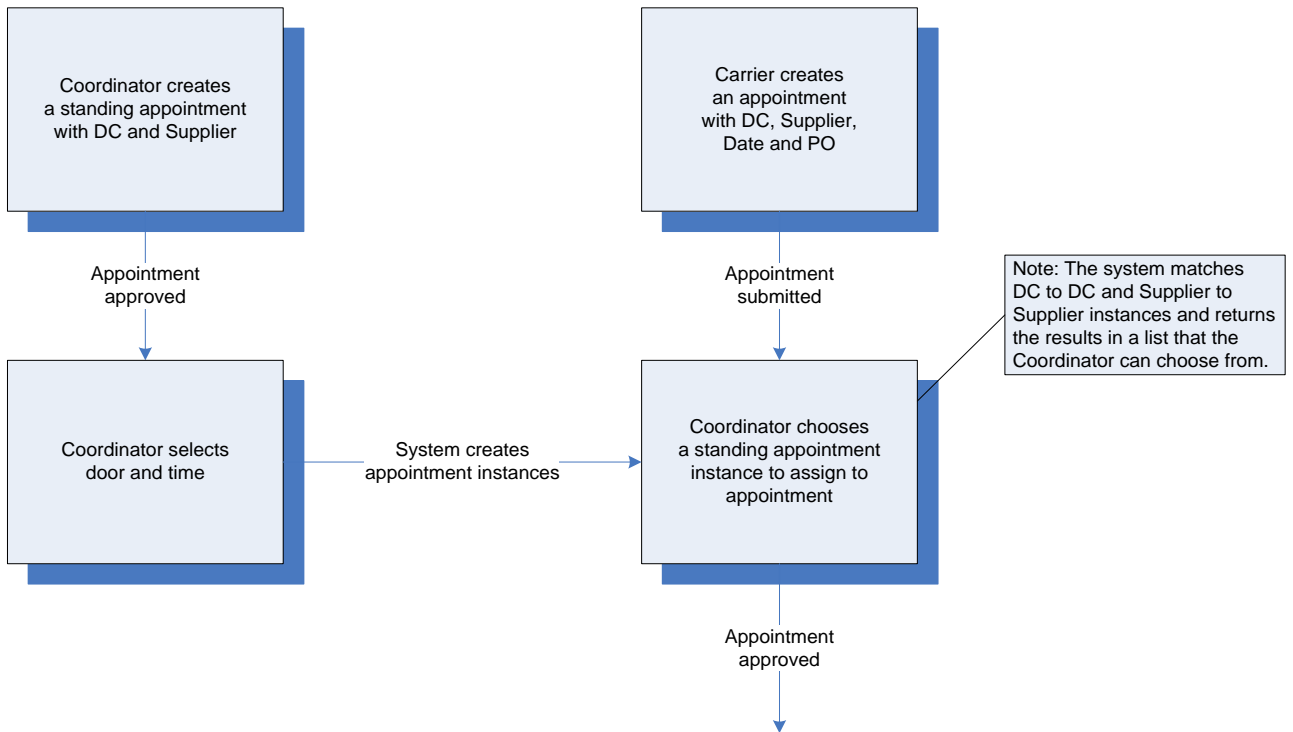
In Scenario three, for a DC where auto-scheduling is not setup, the Carrier creates an appointment and submits it to the Coordinator, but the Supplier changes the request date on the appointment before the Coordinator approves it. The Coordinator approves the appointment, but before it arrives at the DC, the Supplier updates the PO# on it. The Supplier then must resubmit it to the Coordinator, who again approves the appointment. When the appointment arrives at the DC, the DC Check-in user checks the appointment in and checks it out after the carrier departs.



In Scenario four, for a DC where auto-scheduling is not setup, the Coordinator creates a standing appointment with a specific DC and Supplier and selects the door and time. The system creates appointment instances, or place holders for the selected door. The Carrier creates an appointment with a specific DC and Supplier and submits it to the Coordinator, who chooses to approve the appointment as a standing appointment. The Coordinator selects a standing appointment time and door from the **Approve as Standing Appointment** page, which approves the appointment.

➡ **Note**— The system looks at all instances in the system and matches the DC and Suppliers from the standing appointment with the appointment request. The matching instances are returned to the Coordinator in the **Approve as Standing Appointment** page.

When the appointment arrives at the DC, the DC Check-in user checks the appointment in and checks it out after the carrier departs.



Within Descartes Dock Appointments Scheduling, appointments can be viewed on the page relevant to where they are in the process (i.e., a draft appointment can be viewed in the **Created (Draft) Appointments** page, or an approved appointment can be viewed in the **Approved Appointments** page). See [Viewing Appointments](#) for more information.

The **Appointment Details** page allows users to view and make changes to the appointment. See [Viewing Appointment Details](#) for more information.

The **Appointment History** page is an audit trail to let users know who has done what for the selected appointment. See [Viewing Appointment History](#) for more information.

Appointment Process for a DC with Auto-Scheduling

If auto-scheduling is setup for a DC, every appointment request for that DC is validated against the configured auto-scheduling constraints. After calculating the service time for the appointment, the system chooses an appropriate door-based on predefined door capabilities and priorities based on product type and unload method.

If the request meets all the constraints, and the system finds an available door for the requested date and time for the calculated service duration, then the appointment is auto-approved to that door and the carrier is shown a confirmation screen with the approved appointment details. If the requested time is not available, then the system finds alternate appointment times and presents these times to the carrier to choose from. The carrier may choose one the times from this list or may modify their original requested date. If the appointment does not meet any of the constraints, then the appointment is left in the submitted state for a coordinator to manually approve or refuse the appointment. The coordinator can override any of the auto-scheduling constraints while manually approving the appointment.

Viewing Appointments

There are eight types of appointment requests that can be viewed. They are:

- Standing Appointments
- Created (Draft) Appointment Requests
- Submitted Appointment Requests
- Refused/Cancelled Appointment Requests
- Approved Appointments
- Arrived Appointments
- Departed Appointments
- No Show/Delivery Failure Appointments

Standing Appointments

Standing appointments are appointments that are reservations for future appointments. They reserve a block of time for a vendor delivery. Later, a Carrier can ask to deliver using one of these reserved times. Standing appointments do not require detailed data elements and are simple and fast to create. Standing appointments can only be created by a Coordinator. See [Creating a Standing Appointment](#) for more information.

To view a standing appointment:

- From the main menu, select **Dock Appointments > Appointments > Standing Appointments**. The **Standing Appointments** page/tab is displayed. For more information on viewing the appointment's details, see [Viewing Appointment Details](#).
For more information on viewing the appointment's history, see [Viewing Appointment History](#).

Created (Draft) Appointment Requests

Created (Draft) appointments, also known as regular appointments are a type of appointment request that is created for each delivery to a Distribution Center by either a carrier or a supplier. A coordinator can create an appointment as well. These one-time-only appointments must include appointment details such as purchase orders and case counts that will be delivered. See [Creating an Appointment Request](#) for more information.

To view a created (draft) appointment:

- From the main menu, select **Dock Appointments > Appointments > Created (Draft) Appointment Requests**. The **Created (Draft) Appointments** page/tab is displayed. For more information on viewing the appointment's details, see [Viewing Appointment Details](#).
For more information on viewing the appointment's history, see [Viewing Appointment History](#).

Submitted Appointment Requests

Submitted appointment requests are requests that have been submitted to a Coordinator who will validate the appointment request. The Coordinator will then approve or refuse the appointment.

To view a submitted appointment request:

- From the main menu, select **Dock Appointments > Appointments > Submitted Appointment Requests**. The **Submitted Appointments** page/tab is displayed. For more information on viewing the appointment's details, see [Viewing Appointment Details](#).
For more information on viewing the appointment's history, see [Viewing Appointment History](#).

Refused/Cancelled Appointment Request

Refused appointment requests are requests that have been refused by the Coordinator for various reasons. The Coordinator can refuse an appointment request if there is not enough manpower to receive the freight or if it is not a high priority to receive. An appointment can also be refused if it is invalid (contains closed or cancelled PO) or has invalid case counts.

To view a refused/cancelled appointment request:

- From the main menu, select **Dock Appointments > Appointments > Refused/Cancelled Appointments**. The **Refused/Cancelled Appointment Requests** page/tab is displayed.

For more information on viewing the appointment's details, see [Viewing Appointment Details](#).

For more information on viewing the appointment's history, see [Viewing Appointment History](#).

Approved Appointments

Approved appointments are appointments that have been approved. This means that the system has blocked a door at the facility for a given date and time. The Carrier is obligated to deliver at that time or his vendor may be penalized. Carriers can cancel or request a new schedule for appointments as long as they do so twenty-four hours in advance.

To view an approved appointment:

- From the main menu, select **Dock Appointments > Appointments > Approved Appointments**. The **Approved Appointments** page/tab is displayed.

For more information on viewing the appointment's details, see [Viewing Appointment Details](#).

For more information on viewing the appointment's history, see [Viewing Appointment History](#).

Arrived Appointments

Arrived appointments are appointments that have arrived at the facility (Distribution Center) and have a date/time of arrival recorded.

To view an arrived appointment:

- From the main menu, select **Dock Appointments > Appointments > Arrived Appointments**. The **Arrived Appointments** page/tab is displayed.

For more information on viewing the appointment's details, see [Viewing Appointment Details](#).

For more information on viewing the appointment's history, see [Viewing Appointment History](#).

Departed Appointments

Departed appointments are appointments that have departed the facility (Distribution Center) and have a date/time of departure recorded.

To view a departed appointment:

- From the main menu, select **Dock Appointments > Appointments > Departed Appointments**. The **Departed** page/tab is displayed.
For more information on viewing the appointment's details, see [Viewing Appointment Details](#).
For more information on viewing the appointment's history, see [Viewing Appointment History](#).

No Show/Delivery Failure Appointments

No Show appointments (also known as Delivery Failure appointments in some templates) are appointments that have not shown up at the facility (Distribution Center) during their appointed time. The system will automatically mark an appointment as no show or delivery failure if the appointment is not marked arrived within "X" hours of the approved appointment date/time.

➡ **Note**— "X" hours is a system setting that can be changed by the DC Admin.

To view a no show/delivery failure appointment:

- From the main menu, select **Dock Appointments > Appointments > Now Show Appointments** or **Delivery Failure Appointments**. The **No Show or Delivery Failure** page/tab is displayed.
For more information on viewing the appointment's details, see [Viewing Appointment Details](#).
For more information on viewing the appointment's history, see [Viewing Appointment History](#).

To undo a no show/delivery failure appointment, returning it to 'Approved':

- Right-click on an entry on the **No Show Appointments** list page and select **Undo No Show** or **Undo Delivery Failure** from the right-click menu.

Or

- Click the **Undo No Show** or **Undo Delivery Failure** button on the **Appointment Details** page.

Viewing Trailer Arrival/Departure Timestamp Data from Appointment Lists

Related trailer arrival and departure timestamps from Descartes Yard Management can be viewed per appointment in Descartes Dock Appointments Scheduling. This feature is only enabled for clients using Template-C.

| LEGEND | | | |
|--------|------------------------------|--|--------------|
| | Created | | Hot |
| | Submitted | | Re-Submitted |
| | Standing | | Approved |
| | Refused | | Cancelled |
| | Arrived | | Departed |
| | Delivery Failure | | Deleted |
| | Recurring | | Printed |
| | Request Pending > 24 hrs | | |
| | Trailer Arrived in YM | | |
| | Only Arrival Time Recorded | | |
| | Trailer Departed in YM | | |
| | Only Departure Time Recorded | | |

Icons for Trailer Arrived and Trailer Departed appointments appear in the Status column of appointment lists, signifying arrived or departed trailers from Descartes Yard Management related to the marked appointment.

| Dock Appointments / Arrived Appointments | | | | | |
|---|------------|-----------|--------------------|----------------|-----------------|
| Status | Approval # | Request # | Check-In Time | Check-Out Time | Appoin |
| | 2753297 | | 8/6/2012 9:59 AM | | 8/3/201 (01:00) |
| | 2753173 | 1753173 | 8/1/2012 10:17 AM | | 8/1/201 (01:00) |
| Trailer test89 arrived at 8/1/2012 10:46 AM | | | | | |
| | 2752394 | 1752394 | 7/21/2012 11:02 AM | | 7/20/20 PM (01: |
| | 2752317 | | 7/19/2012 11:43 PM | | 7/3/201 (01:00) |
| | 2752290 | 1752290 | 6/26/2012 2:57 PM | | 6/27/20 PM (01: |

A tooltip is displayed when the user hovers the mouse cursor over the trailer icon, related either arrival or departure information.

The columns Trailer Arrival Time and Trailer Departure Time are viewable from the **Approved Appointments, Arrived Appointments, Departed Appointments,**

Appointment History, Dashboard and **Processed Advices** list pages. Relevant trailer arrival and departure time is also displayed on the **Appointment Detail** page for "Approved", "Arrived" and "Departed" statused appointments as well as for Processed Advices.



This information is also displayed on the **Appointment Details** page.

| | | | |
|--------------------------|--------------------------|--------------------------|-----------|
| <input type="checkbox"/> | Track as hot appointment | <input type="checkbox"/> | Yard Drop |
| Status: | Arrived | | |
| Check-In Time: | 8/1/2012 10:17 AM | | |
| Appointment Date/Time: | 8/1/2012 9:00 AM (01:00) | | |
| Approval Number: | 2753173 | | |
| Requested Date/Time: | 8/1/2012 9:00 AM | | SUGGEST |
| Trailer #: | test89 | | |
| Trailer Arrived: | 8/1/2012 10:46 AM | Trailer Departed: | |

Viewing Edited Trailer Arrival/Departure Values

The Trailer Arrived and Trailer Departed fields are editable for appointments in "Approved", "Arrived", "Departed" or "Delivery Failure" status without a linked trailer in Descartes Yard Management. This feature allows Coordinator users to update these fields from Descartes Dock Appointments. For more information on this feature, please see the *Template-C: Editing Trailer Arrived/Departed Fields* section.

Appointments that have been updated with a Trailer Arrived and/or Trailer Departed date/time value but do not have an associated trailer arrived or departed in Descartes Yard Management are marked with unique icons on the appointments list pages.

- 
 – Appointments marked with this icon have an Arrival Time value but no associated trailer in Descartes Yard Management
- 
 – Appointments marked with this icon have a Departure Time value but no associated trailer in Descartes Yard Management

When users hover the mouse cursor over these icons, a tooltip is displayed.

| | | | | |
|--|--|---------------------------|---------------------------------|--------------------|
| | | 5/3/2018 | 5/3/2018 4:50:09 PM | 4739135 |
| Trailer ABC recorded arrival time: 11/14/2018 5:24 PM. Trailer is not in YM yet! | | | | |
| | | 11/14/2018 12:24:25 PM | 11/14/2018 5:24:25 PM GMT | 4739981 4739135 |
| | | 11/14/2018 12:47:29 PM | 11/14/2018 5:47:29 PM GMT | 1234567 |

| | | | | |
|---|--|--------------------------|----------------------------------|-----------------------------|
| | | 11/12/2018 1:57:21 PM | 11/12/2018 6:57:21 PM MT | HYPO901 HYPO902 22222 |
| Trailer TRL1234567 recorded departure time: 11/12/2018 6:25 PM. Trailer was not departed in YM! | | | | |
| | | 11/12/2018 1:42:29 PM | 11/12/2018 6:42:29 PM GMT | 2465312 2348874 |
| | | 10/24/2018 6:11:25 PM | 10/24/2018 11:11:25 PM GMT | DSGPO11 TEST_08.2 |

Viewing Appointment Details

To view appointment details:

- 1 From the selected appointment page, double-click on an appointment.
- 2 The **Appointment Details** page is displayed for that appointment. This page is customized by customer and displays different fields and layout depending on the template used and the applied global settings:

Template-C

Dock Appointments / Appointment Details - Request# 1762389
Appointment Details Appointment History

UPDATE
AUTO-APPROVE
SELECT ADVICES
APPROVE
REFUSE
CANCEL
DELETE
EMAIL
PRINT
BACK

Track as hot appointment
 Yard Drop
 Use standing appointment

Ship To: DSGtestDC&

Status: Submitted Reason Code:
 Request Number: 1762389 Requested By: DA Admin
 Requested Date/Time: 2/13/2015 11:50 PM SUGGEST Estimated Unload Time: 00hr 03m could be inaccurate due to insufficient data
 Trailer #: Select Equipment Type... Routing #:
 Carrier: DSG Test Carrier& (DSGT) - Descartes Systems Grou Supplier: DSG Supplier& (TEST) - Test Supplier
 Address: Waterloo, ON CA Address: street address, city city, st 344545,
 Contact: Phone: Fax: Contact: contact contact, Phone: Fax:
 Driver: driver 1 Preferred Carrier: Carrier Five
 License#: license 1

If load was brokered to you by a preferred carrier or you are a supplier tendering load to a preferred carrier - select carrier name in drop down box above

| ! | O | N | D | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | Type |
|-----|---|---|---|--------------|-------|---------------|----------|-----|------------|---------------|-------|---------|------|
| !!! | | | | 5634653 6 | | rtreyrt | | | | | 55 | | PLT |

PO #: 56346536 Pro #: FLR PLT
 Supplier Name: rtreyrt
 Quantity: 55 Originated from Advice Number:

Cases
Pallets
Cases Ordered

 Comments:
 Event Code: STA:
 First Receipt: Last Receipt: Last Bill:

NEW
DELETE
COPY/PASTE PO ENTRY

| STA COLOR LEGEND | | | | | | |
|------------------|-----------|---------------|--------------|-----------|----------|--|
| Rejected | Exception | On Time | Late | Exception | Rejected | |
| Timeline: | -10 Days | First Receipt | Last Receipt | Last Bill | +5 Days | |

| VALIDATION CODES | |
|--|---|
| * GOOD: PO # is valid | 0 |
| *X WARNING: PO # is cancelled | 0 |
| *C WARNING: PO # is closed | 0 |
| *D WARNING: PO # is deleted | 0 |
| ? WARNING: Cases entered is greater than cases ordered | 0 |
| !!! WARNING: PO # not found in system | 1 |

Private:

NEW
DELETE

After saving this form, return to last screen

Template-M

Dock Appointments / Appointment Details - Approval# 2243321
[Close] [Refresh] [Print]

Appointment Details Appointment History

UPDATE CANCEL CHECK IN/OUT MOVE TO NO SHOW RESCHEDULE DELETE EMAIL PRINT BACK

| | | |
|---|--|---|
| Status: <input type="text" value="Approved"/> | Reason Code: <input type="text"/> | Ship To: <input type="text" value="9999 - Descartes Group - 9999 - Descartes"/> |
| Confirmation #: <input type="text" value="2243321"/> | Confirmed By: <input type="text" value="User Name"/> | Address: <input type="text" value="1155, Fax: 1155"/> |
| Request Number: <input type="text" value="1243321"/> | Requested By: <input type="text" value="User Name"/> | Coordinators: <input type="text" value="1155, Fax: 1155"/> |
| <input type="radio"/> Use standing appointment | Appointment Date: <input type="text" value="7/11/2013 10:00 (00:30)"/> | Click here to view facility information. |
| <input checked="" type="radio"/> Standard appointment | Dock Number: <input type="text" value="059"/> | Instructions: * THE CUTOFF FOR NEXT DAY BOOKINGS IS 2PM ** ALL SUBMITTED BOOKINGS MUST GET A CONFIRMATION BACK ** ENTER PALLET QTYS IN THE NON-SHADED BOX TO THE RIGHT ** CONTACT [Redacted] FOR BOOKING QUERIES. ** ONLY ONE BOOKING PER TRUCK |
| <input type="checkbox"/> Track as hot appointment | <input checked="" type="checkbox"/> Multiple suppliers | |
| Carrier: <input type="text" value="9999 - Descartes Group - 9999 - Descartes"/> | Supplier: <input type="text"/> | Cartons: <input type="text" value="179"/> |
| Requested Date: <input type="text" value="7/11/2013 10:00"/> | Unload Method: <input type="text" value="Container"/> | Pallets: <input type="text"/> |
| Trailer Regn. #: <input type="text" value="APRU6128084"/> | Intl. Container #: <input type="text" value="APRU6128084"/> | GOH: <input type="text"/> |
| Additional Note: <input type="text"/> | Product Type: <input type="text" value="Intl. Cartons / Boom"/> | Bulky: <input type="text"/> |

| ! | Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Cartons | GOH | Bulky | Order Type | Class Group | EQ Order Type |
|---|-----|--------------|-----------|------------|---|----------|---------|-----|-------|------------|-------------|---------------|
| * | | 000001318171 | 400041952 | 4105524 | 9999 - Descartes Group - 9999 - Descartes | | 19 | 0 | 0 | O | 9651 | ALC |
| * | | 000001318174 | 400041968 | 4105524 | 9999 - Descartes Group - 9999 - Descartes | | 23 | 0 | 0 | O | 9651 | ALC |
| * | | 000001318409 | 400041960 | 4105524 | 9999 - Descartes Group - 9999 - Descartes | | 23 | 0 | 0 | O | 9651 | ALC |

| | | |
|--|---|---|
| Supplier: <input type="text" value="9999 - Descartes Group - 9999 - Descartes"/> | Supplier Name: <input type="text" value="9999 - Descartes Group - 9999 - Descartes"/> | Class Group: <input type="text" value="9651"/> |
| PO #: <input type="text" value="Not in List..."/> | ASN #: <input type="text" value="Not in List..."/> | EQ Order Type: <input type="text" value="ALC"/> |
| Order Type: <input type="text" value="O"/> | SSCC Qty: <input type="text" value="23"/> <input type="text" value="0"/> <input type="text" value="0"/> | Ad Date: <input type="text"/> |
| <input type="checkbox"/> Hot Item | | |

| Comment | Saved By |
|------------------------|---|
| food program aquis | 9999 - Descartes Group - 9999 - Descartes |
| 525 cartons 16 pallets | 9999 - Descartes Group - 9999 - Descartes |
| food program aquis | 9999 - Descartes Group - 9999 - Descartes |

Private:

NEW

NEW DELETE MULTIPLE PO ENTRY

Template-W

Dock Appointments / Appointment Details - Approval# 2010667
[Close] [Print] [Refresh]

Appointment Details
Appointment History

UPDATE
CANCEL
CHECK IN/OUT
MOVE TO NO SHOW
RESCHEDULE
DELETE
EMAIL
PRINT
BACK

Track as hot appointment Yard Drop

Status: Reason Code:

Appointment Date/Time: Door(s):

Approval Number: Approved By:

Request Number: Requested By:

Requested Date/Time: Mode: TL LTL

Carrier: Supplier:

Trailer #: Routing #:

Quantity:

Carton s Pallet s Loose GOH Units Shipped Weight t Cube (M) Cube (l)

Ship To:

Address: Phone: Fax:
 Coordinators: [Click here to view facility information.](#)

Instructions: The yard hours for pick up of empty trailers are Monday to Friday, 5:30 am - 12:00 midnight. For Inquiries, call 905-451-8827.

| Comment | Saved By |
|--------------------|--|
| Replenishment po's | REPLENISHMENT SERVICES INC. 1/18/2010 11:00 AM |
| Replenishment po's | |

Private:

NEW

After saving this form, return to last screen

| I | N | D | PO # | FOB | Carton s | Ladder Plan | Dept# | Units | Start Ship | Cancel At | Hot Deal | AD | PrePac k | Pre |
|---|---|---|-------------------|-----|----------|-------------|-------|--------|------------|-----------|----------|----|----------|-----|
| * | | | 10828866_20100113 | | 0 | 0110 | 26 | 147.00 | 1/18/2010 | 1/21/2010 | | N | Y | Y |

Managistics #

PO #: X FOB:

N: Y: 193.00 Y: Y:

AD: PrePack: Units: PreTicket: Store Ready:

Ladder Plan: Department#: Hot Deal: Start Ship Date: Cancel at DC Date:

Quantity:

Cartons Pallets Loose GOH Units Shipped Weight Cube (M) Cube (l)

Supplier Name:

Comments:

NEW
MULTIPLE PO ENTRY

VALIDATION CODES

| | |
|---------------------------------------|---|
| * GOOD: PO # is valid | 2 |
| /// WARNING: ASN # booked previously | 0 |
| !* WARNING: PO details not available | 0 |
| ??? WARNING: PO # not found in system | 0 |

From this window, users can select button functions that may be performed on the appointment depending on the user type and on what status the appointment is in at the time.

For example, if the appointment is refused and the Carrier wants to resubmit it, she or he would click **Submit**. If the appointment is Standing or Created (Draft) and the user is a Coordinator that wants to approve the appointment, she or he would click **Approve**. These functions are described in detail in the sections describing each user type.

Please see [Appendix B: Available Commands by User and Appointment Status](#) for a list of commands available on the Appointment Details page based on appointment state and logged in user.

Viewing Appointment History

To view appointment details:

- 1 From the selected appointment page, right-click on an appointment.
- 2 Select **Appointment History**. The **Appointment History** page is displayed for that appointment.

Note— Pink highlighted fields identify the changes made to the appointment.

The E-mail Notification column provides users with visibility of notification emails per appointment. When users click the link displayed in this column, the **Details – Email Notification** popup displays in the lower right-hand portion of the **Appointment History** page, listing the notifications and notification recipients for the selected appointment version.

| DC | Supplier | Carrier | Trailer # | Trailer Arrived At | Trailer Departed | CVS Routing # | Comments | Qty | E-mail Notification |
|------------|---------------|------------------------------------|--------------|--------------------|------------------|---------------|----------|-----------|------------------------------|
| DSGtestDC& | DSG Supplier& | DSG Test Carrier& (DSGT) - HY TEST | zba_11031401 | 11/3/2014 11:08 AM | | | | 154 cases | 11/3/2014 4:11:18 PM GMT ... |
| DSGtestDC& | DSG Supplier& | DSG Test Carrier& (DSGT) - HY TEST | | | | | | 154 cases | 11/3/2014 4:11:18 PM GMT ... |
| DSGtestDC& | DSG Supplier& | DSG Test Carrier& (DSGT) - HY TEST | | | | | | 154 cases | 11/3/2014 4:11:18 PM GMT ... |

Details - E-mail Notification

11/3/2014 12:51:18 PM GMT - "Appointment Approved" e-mail sent to: h.yip@hotmail.com;hyip@descartes.com;pabelskiy@descartes.com

11/3/2014 12:51:18 PM GMT - "Appointment Reminder" processed. No e-mail sent as no recipients are subscribed to be notified about this type of appointment update

Rows 1 - 3 of 3 / Page 1 of 1 Rows per page: 50 Page 10 / 20 / 50 Page 1

If the appointment change has not been processed by the email notification system, instead of a date and time, the link will say "Unprocessed". It is possible for more than one email to be displayed associated with the same appointment version.

The following statuses are available in the E-mail Notification column on the **Appointment History** page when the **Send appointment e-mail notifications to line level suppliers** setting is enabled:



- No line level suppliers found: Indicates that none of the appointment line items contain SupplierParty IDs i.e., no potential email recipients.
 - ➡ **Note**— This case differs from a case where there are no line level supplier party users subscribed to receive this type of appointment change notification. In this case, the system will show the following: "No e-mail sent as no recipients are subscribed to be notified about this type of appointment update". No line-level suppliers could indicate a problem with the PO validation profile item (SELECT for Template-C or SELECT1 and SELECT3 for Template-M) because they are responsible for initializing the SupplierPartyID from the database.
- E-mail address longer than 1024 characters: A single email address is longer than 1024 characters. This case is unlikely, but possible.

Searching Appointments

To search for specific appointments or appointment types:

- 1 From the main menu, select **Dock Appointments > Search Appointments**. The **Search Appointments** window displays.

- 2 Under **Search Appointments**, select the type of appointments you want to search on.
- 3 Select the reference number type and enter the reference number. Users can select from the following types: **Request #, Approval #, PO #, Probill #, Routing #, Trailer #, AP Code** or **External ID**.

- 4 Select the appointment date type and type the appointment date or click  and select a date.
- 5 Select the requested date type and type the requested date or click  and select a date.
- 6 Select the carrier name, reason code and ship to DC.
- 7 Click **Search**.

To use the simple search:

- 1 Click **Simple**.
- 2 Select the reference number type and enter the number in the box next to the type box.
 - ➡ **Note**— You can set advanced search options by clicking **Advanced**.
- 3 Click **Search**.

Printing an Appointment

To print an appointment:


- 1 From the **Appointment Details** page, select **Print**. The **Appointment Details Form** displays in a print-friendly format along with the **Print** window.
- 2 Click **Print** to print the request form or click **Cancel** to return to the **Appointment Details Form**. Click **X** to close the request form.

Configuration and Display of Hot Appointments

Hot Appointment functionality allows users to identify, sort and process high priority appointments and appointments with high priority line items (purchase orders). Clients using Template-C can mark single purchase orders as "Hot" on the **Appointment Details** and **Copy/Paste PO Entry** pages and in batches from the **Assign Hot POs** window.

Appointment Details: Marking Hot Appointments at the Header and Line Level

Individual purchase orders can be marked as "Hot" by selecting the **Hot Item** checkbox on the **Copy/Paste PO Entry** and **Appointment Details** pages. When selected for a purchase order, the Hot column will be populated with a red flag icon in the line item table.

| ! | O | N | D | Hot | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | Type |
|-----|---|---|---|---|------|-------|---------------|----------|-----|------------|---------------|-------|---------|------|
| !!! | | | Y |  | 12 | | supplier a | | | | | 7 | 7 | PLT |

PO #: Hot Item: Pro #:

Supplier Name: FLR PLT

Quantity: Originated from Advice


Cases Pallets Cases Ordered Number:

Comments:

Event Code: STA:

First Receipt: Last Receipt: Last Bill:

Similarly, a red flag icon will appear when users select the **Track as hot appointment** checkbox on the appointment header.

 Track as hot appointment

Hot PO Batch Management: Assign/Unassign Hot POs Window

Users can manage the "Hot" status of purchase orders in batches using the **Assign/Unassign Hot POs** button in the **Summary** pane of the Dashboard. This feature is enabled via the **Allow Multiple Hot POs Assignment (popup form)** global setting.

Summary

Approval:

APPOINTMENT COUNT 2519
6

Created (Draft): 95
Submitted: 433
Refused/Cancelled: 13881
Approved: 6508
Arrived: 152
Delivery Failure: 4034

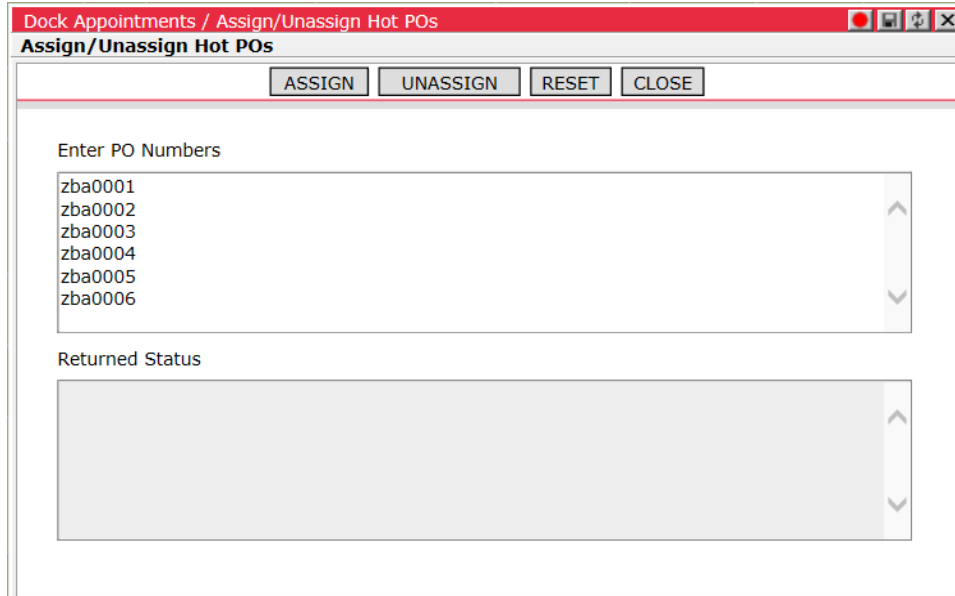
LEGEND

| | | | |
|--|--------------------------|--|------------------|
| | Created | | Hot |
| | Submitted | | Re-Submitted |
| | Standing | | Approved |
| | Refused | | Cancelled |
| | Arrived | | Departed |
| | Delivery Failure | | Deleted |
| | Recurring | | Printed |
| | Request Pending > 24 hrs | | |
| | Trailer Arrived | | Trailer Departed |

DA Admin Inbox

| Hot | Status | Request # | Reason Code | Last Modified On | DC | Probill # | Comments | PO # | PO Count | Qty | U |
|-------------------------------------|--------|-----------|----------------------------------|---------------------|-------------|-----------|---|----------------|----------|----------------------|---|
| <input checked="" type="checkbox"/> | | 1580069 | | 6/7/2017 8:21:10 AM | DSG Test DC | pro#002 | 1. add comment to send email notification to carri... | testPO testPO2 | 2 | 110 cases, 2 pallets | 6 |
| <input checked="" type="checkbox"/> | | 1580068 | Re-Submitted by Carrier/Supplier | 6/7/2017 4:52:15 AM | DSG Test DC | pro#002 | | testPO testPO2 | 2 | 300 cases, 2 pallets | 0 |
| <input checked="" type="checkbox"/> | | 1580067 | Re-Submitted by Global Admin | 6/7/2017 4:34:14 AM | DSG Test DC | | 1. test bug 408522 | testPO | 1 | 100 cases | 0 |
| <input checked="" type="checkbox"/> | | 1580066 | Re-Submitted by Global Admin | 6/7/2017 4:29:25 AM | DSG Test DC | | 2. test bug 408522 | testPO testPO2 | 2 | 200 cases | 0 |
| <input checked="" type="checkbox"/> | | 1580065 | Re-Submitted by Carrier/Supplier | 6/6/2017 2:49:57 PM | DSG Test DC | | | testPO | 1 | 300 cases | 1 |
| <input checked="" type="checkbox"/> | | 1580064 | Re-Submitted by Global Admin | 6/7/2017 4:22:11 AM | DSG Test DC | | | testPO testPO2 | 2 | 200 cases | 0 |
| <input checked="" type="checkbox"/> | | 1580062 | Re-Submitted by Carrier/Supplier | 6/5/2017 3:53:28 PM | DSG Test DC | | 1. test | testPO | 1 | 70 cases | 4 |

From the **Assign/Unassign Hot POs** window, DA Admin users can copy and paste multiple purchase order numbers and click **Assign** to have the system attempt to mark the entered purchase orders as "Hot".



The Returned Status field will populate with successful assignments, detailing the appointments on which each purchase order appears and its Approval Number or Request Number values. It will also indicate if the purchase orders were updated or found in the external purchase order data source. Users will be notified of any errors in case an entered purchase order is not found.

To remove "Hot" status from multiple purchase orders numbers, copy and paste the desired purchase order numbers and click **Unassign**. The system will attempt to remove "Hot" status from the entered purchase orders. As with the assignment process, users are notified of results in the Returned Status field.

To clear the fields of data, click **Reset**.

Note— The **Reset** button will not undo previously executed assignments.

Viewing Hot Appointments on List Pages

The Hot column displays a red flag icon for appointments that have been marked as "Hot" at the header or line item levels.

| Status | Hot ▾ | Request # |
|--------|-------|-----------|
| | | 1760267 |
| | | 1763990 |

A tooltip is displayed when users hover the mouse cursor over the red flag icon in the Hot column. If the appointment contains one or more purchase orders marked as "Hot", the tooltip provides the total number of "Hot" purchase orders and lists the PO numbers.

| Status | Hot ▾ | Request # |
|--------|-------|-----------|
| | | 1760267 |
| | | 1763990 |

Contains 1 hot PO:
563456

If the appointment is marked as "Hot" at the header level, but contains no "Hot" purchase orders, the tooltip reads "Hot Appointment." If the appointment is marked "Hot" at both the header and line items levels, the tooltip will display both messages.

Appointments can be sorted values in the Hot column and will appear in as follows when sorted in "descending" order.

- Appointments marked as "Hot" at the header level that contain "Hot" purchase orders are listed first. Among this group, appointments with a greater number of "Hot" purchase orders are displayed higher in the list.
- Appointments that contain "Hot" purchase orders are listed next. Among this group, appointments with a greater number of "Hot" purchase orders are displayed higher in the list.
- Then, appointments marked as "Hot" at the header level and contain no "Hot" purchase orders are listed.
- All other appointments are listed after.

Appointments are shown in reverse order when sorted in "ascending" order.

Hot Appointment Global Settings

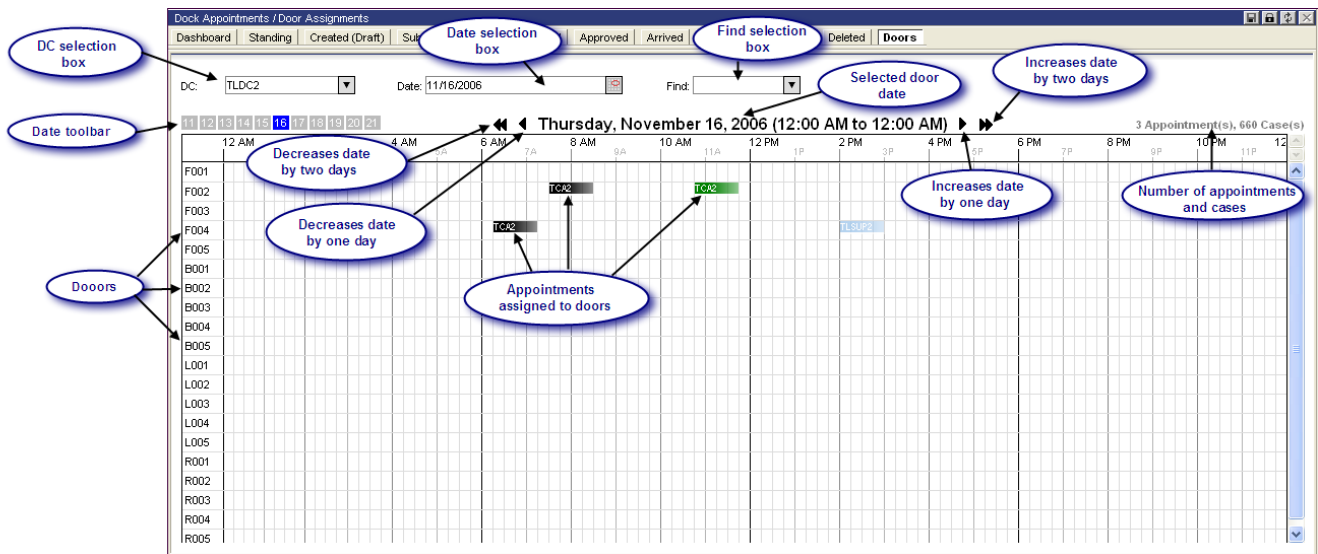
From the Hot Appointment Settings section on the **Global Settings** page of Template-C, users can control access and validation for Hot Appointment functionality. Please see [Template-C Global Settings](#) for details.

Understanding Door Assignments

The **Door Assignments** page can be accessed by:

- Selecting **Dock Appointments > View Door Assignments**
- Clicking the **View Door Assignments** button under Summary on the dashboard
- Clicking the **Doors** tab
- Upon approving an appointment
- Or, when rescheduling an appointment

The following image illustrates the typical components of the **Door Appointments** page.



Assignments are color coded based on their status. The following table shows the colors and meaning.

| Color | Meaning |
|---|---|
| TC A2 - black | Approved appointment |
| TC A2 - red | No Show/Delivery Failure |
| TC A2 - green | Arrived |
| TL SUP 2 - light blue | Standing appointment |
| DSGT - grey | Departed |
| TEST - tan | Cancelled/Resubmitted by Carrier/Supplier |

Viewing Door Assignments

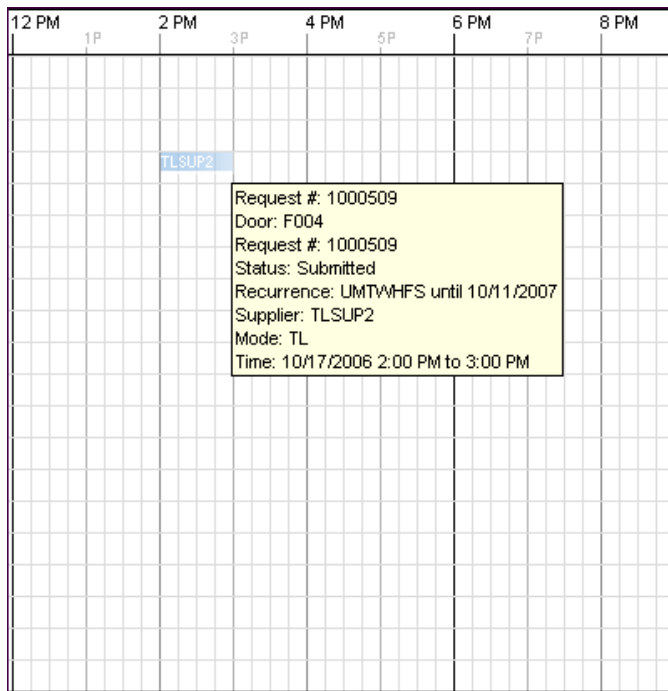
To view door assignments:

- 1 From the main menu, select **Dock Appointments > View Door Assignments**. The **Doors** page/tab is displayed.

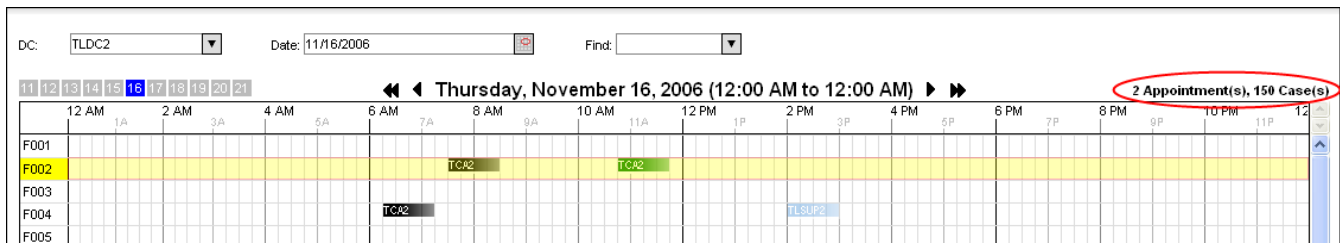
- 2 Do one of the following:

- Select a door and date to view.
- In the **Find** box, select a field to search and then enter the information for that field. The fields are:
 - SCAC
 - Request#
 - Approval#
 - PO#
 - Probill#
 - Routing#
 - Trailer#
- Click a date in the date bar (5 6 7 8 9 10 11 12 13 14 15 TODAY) to select a date to view.

- Click one of the following to:
 - ◀◀ - move the date back two days
 - ◀ - move the date back one day
 - ▶ - move the date ahead one day
 - ▶▶ - move the date ahead two days
- 3** Hold the mouse over the door assignment to view information on that door assignment as shown below.

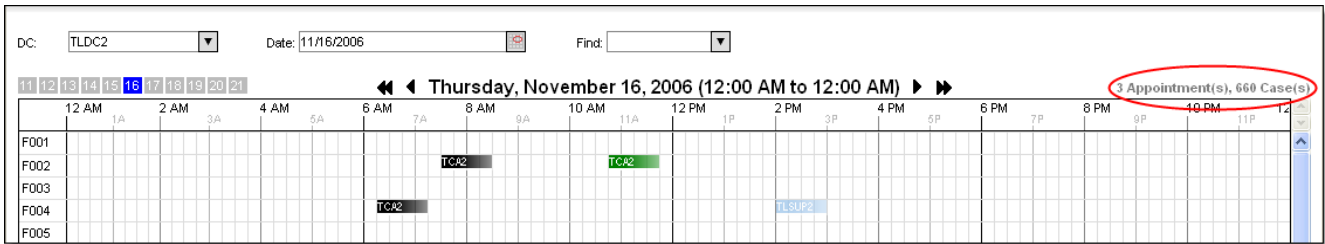


- 4** To calculate the quantities for a door or doors, highlight the desired doors and the results will be shown in the top right-hand corner as shown below.



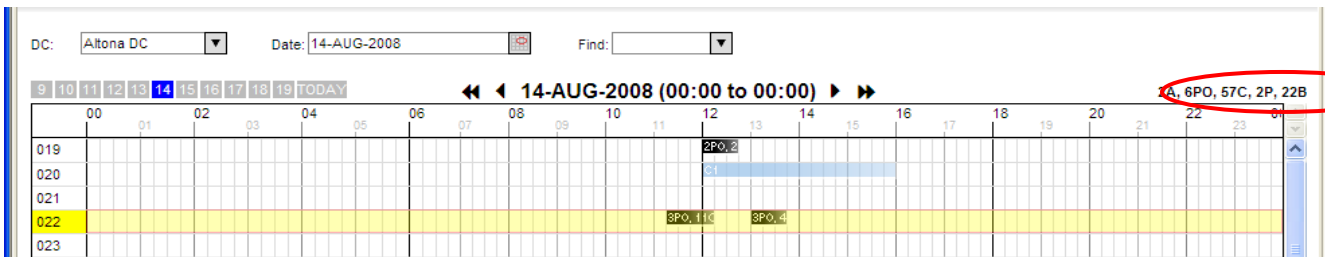
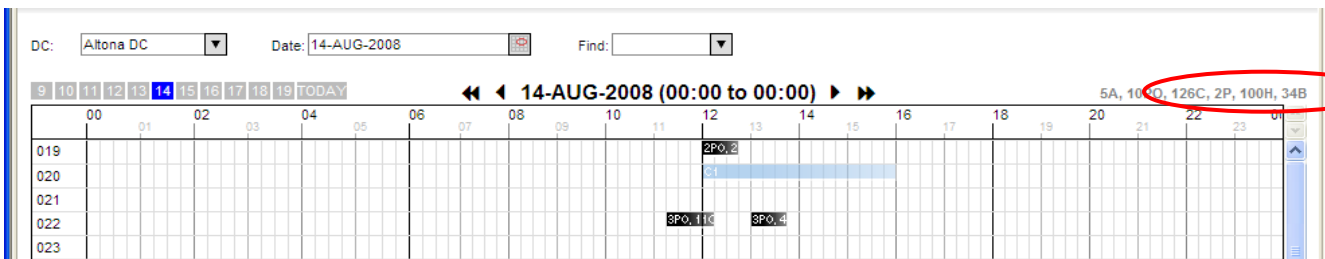
Two appointments were selected and the number of cases totaled 150. In a similar way, highlight the desired time frame within a day to view the appointments and cases scheduled for a given door range and/or time frame combination.

➡ **Note**— When a day is first viewed; if it has approved, arrived on time, or late appointments; the total number of appointments and cases displays in the top right-hand corner. For the example above, when the **Door Assignment** page is first opened, the following displays.



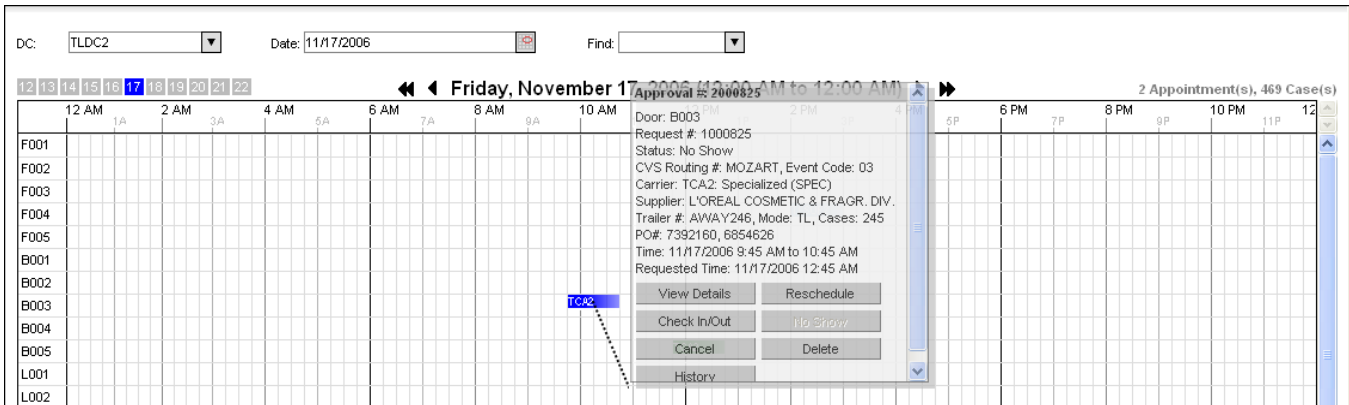
If there a standing appointment is assigned to a door, it will not display as an appointment or with any cases.

The counts are broken down by product type in the example below, when appointment requests include the product type details.



5 Right-click on an appointment to view the approved appointments information and have the ability to select one of the following tasks for the appointment.

- **View Details** – Displays the **Appointments Detail** page.
- **Check In/Out** – Checks in or out the appointment.
- **Cancel** – Cancels the appointment.
- **History** – Displays the **Appointments History** page.
- **Reschedule** – Allows user to reschedule the appointment.
- **No Show/Delivery Failure** – Allows user to mark appointment as a No Show/Delivery Failure.
- **Delete** – Deletes the appointment.



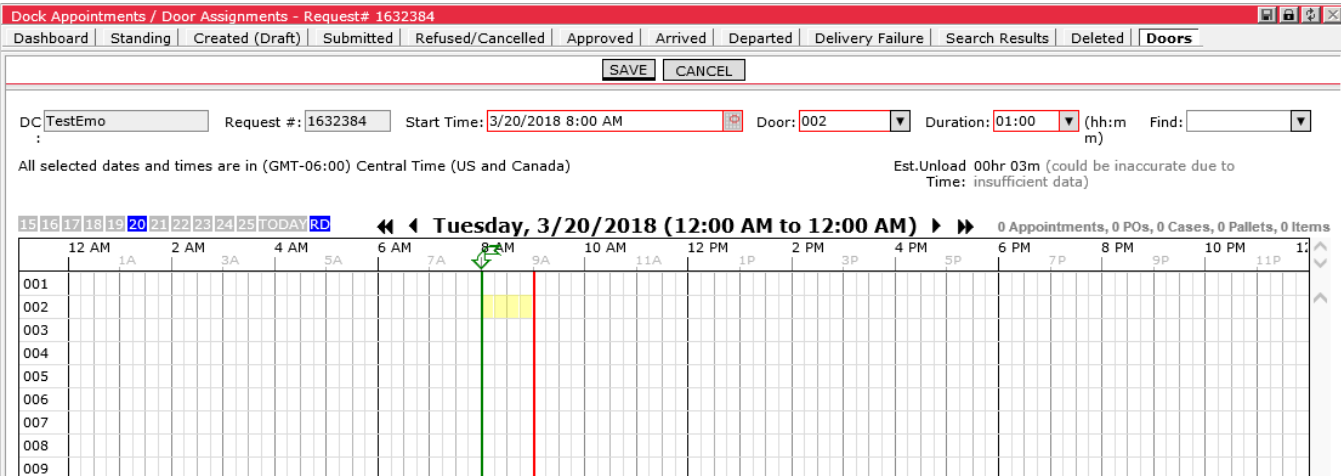
Approving an Appointment

Note— Only Coordinators can approve appointments.

To approve a submitted appointment request:

- 1 Do one of the following:
 - From the **Submitted Appointments** page, right-click on the desired appointment and select **Approve**.
 - From the **Appointment Details** page, click **Approve**.

The **Door Assignments** page is displayed.



Note— You can also get to the **Door Assignment** page when rescheduling an Appointment.

- 2 In the Door field, select a door for the appointment.

- In the Start Time field, select a start time for the appointment if different from current time.

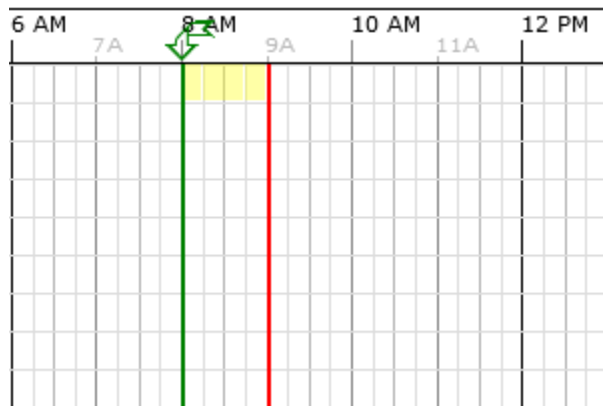
Or,

Move the green and red bars (date/time bars) by clicking on a door/time combination in the grid. To change the date, use one of the date controls at the top of the grid. See example below.

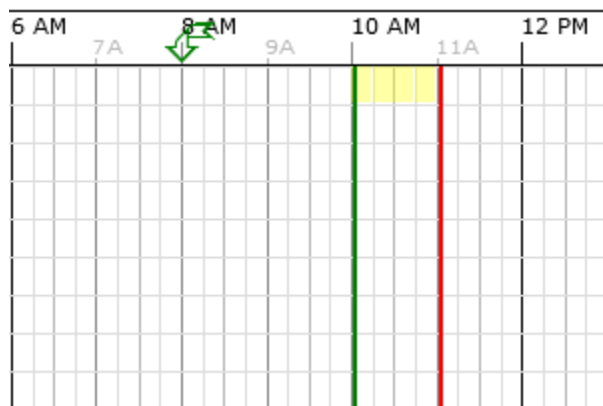
Note— The green arrow, as shown below, marks the requested time. The green line can be moved to a different time, but the green arrow is stationary. The red line marks the end of the duration time.

Example:

The requested time for this appointment is 8 a.m. to 9 a.m.



This time does not work for you, but 10 a.m. does, click 10 a.m. for that door and the green and red bars automatically move to that time period.



- In the Duration field, select the time duration for the door assignment.

Or,

Drag the green or red bar to a new position to change the duration.

- 5 Click **Save** to assign the door and approve the appointment or click **Cancel** to return to the **Submitted Appointments** page.

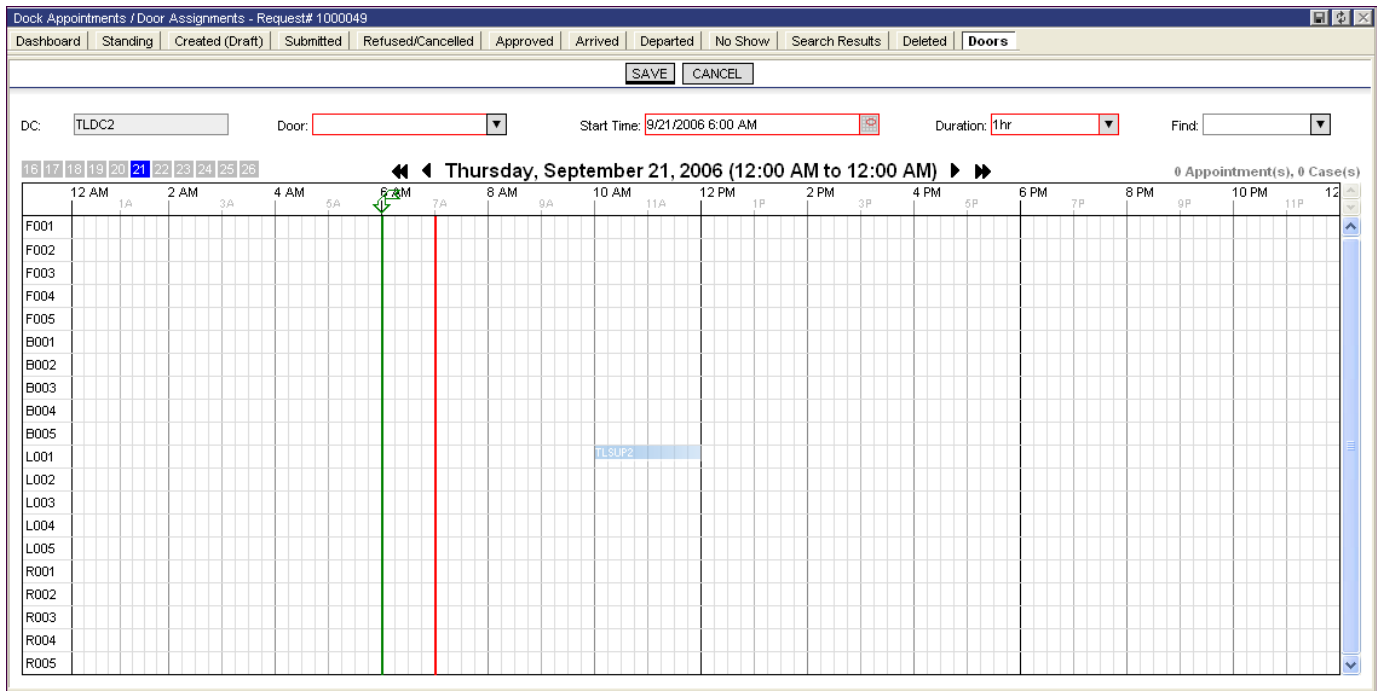
Rescheduling an Appointment

Note— Only Coordinators can reschedule appointments.

To reschedule an appointment:

- 1 From the **Assignment Details** page of an arrived or no show/delivery failure page, click **Reschedule**.

The **Door Assignments** page is displayed.



- 2 In the Door field, select a new door for the appointment.

Note— Multiple doors can be selected for an appointment.

- 3 In the Start Time field, select a new start time for the appointment. In the Start Time field, select a start time for the appointment if different from current time.

Or,

Move the green and red bars (date/time bars) by clicking on a door/time combination in the grid. For an example of this functionality please see Step 3 of the [Approving an Appointment](#) section.

To change the date, use one of the date controls at the top of the grid.

➡ **Note**— The green arrow, as shown below, marks the requested time. The green line can be moved to a different time, but the green arrow is stationary. The red line marks the end of the duration time.

- 4 In the Duration field, select the time duration for the door assignment.

Or,

Drag the green or red bar to a new position to change the duration.

- 5 Click **Save** to reschedule the appointment or click **Cancel** to return to the **No Show/Delivery Failure** page.

The appointment is returned to the **Approved Appointments** page after being rescheduled.

DA Admin Tasks

The DA Admin is a global super user with access to all data and functions in the system. The DA Admin can perform the following tasks in addition to the tasks performed by a DC Admin:

- Set up Global Notifications
- Resubmit failed appointment email notifications
- Resubmit approved appointments for another time or date, prompting the DC Admin to review
- Import carriers/suppliers

Setting Up Global Notifications

DA Admin users can send messages to users in the system using the Global Notifications functionality. This feature can be configured to notify users of particular parties and DCs who have appointments in certain statuses scheduled in specified date ranges of important news.

Creating Global Notifications

To create a new notification:

- 1 From the main menu, select **Setup > Global Notifications**. The **Global Notifications** list page appears, displaying all notifications created in the system.
- 2 Right-click on the page and select the **New Notification Message** option. The **New Notification Message** page appears at the bottom of the screen.

When creating a notification, consider the following: The notifications are created to reach *users/parties* that have *appointments* at specified *distribution centers* in a given *status* scheduled during a certain *time period*. The number of recipients is narrowed by the given parameters.

- From the **Send to** dropdown, select the users you wish to notify using the checkboxes in the dropdown list. More than one option can be selected.

Send to: DC - Coordinators, DC - Check-In, DC - Read Only U

- All Parties
- All DC Users
- DC - Admins
- DC - Coordinators
- DC - Check-In
- DC - Read Only Users
- DC - Gate Guard
- DC - Yard Jockey
- DC - Shipping Receiving
- Carrier Users

Send Message on: [] Not Relevant After: []

The **All Parties** options will override granular selections in the menu.

- From the DC dropdown (having appointments at), select the distribution center(s).

having appointments at status(es): Any DC

- Any DC
- Bessemer
- Chemung full cs
- Chemung- NY
- Chemung RX
- Conroe
- Conroe Bulk
- Conroe copy ZBA
- Conroe RX

Send e-mail

The **Any DC** option will override granular selections from the list. Selecting an option in addition to **Any DC** will automatically deselect **Any DC**.

- Select the appointment status.

Again, the **Any** option will override granular selections from the menu.

➤ **Note**— Status and appointment date range only applies to suppliers and carriers for the limiting factors. DC users will receive the message regardless of status and date range.

- 6 Select the date range of scheduled appointments. This can be a **Single Day**, a **Date Range** or specific days within a date range (ex. November 17 to November 24, Monday, Wednesday and Friday). The Requested Date value is used to filter "Submitted" and "Refused/Cancelled" status appointments. The Appointment Date value is used to filter all other relevant appointments.

- 7 Enter the Subject and Text of the notification.
 - 8 Select the time period in which the notification is Active; this is the date range during which the message will be distributed to users in the system. The active date range may end before the top range takes effect. For example, if a gate is going to be closed on a particular date, the message will need to be sent before the closure takes effect.
 - 9 Select the **Send email also** checkbox to have the message sent to the applicable user's email address once the message is Active.
 - 10 Click **Save**. The notification is added to the **Global Notifications** list page. A color indicator will appear in the Send Dates column:
 - Active notifications are marked in green. Active notifications are currently being distributed to specified users.
- **Note**— It's possible for new recipients to be added automatically to the message at a later date. For example: a message is addressed to all carriers with an Approved appointment at a certain DC in the month of November.

When a new appointment becomes approved, the related carrier party will also receive the message.

- Pending notifications are marked in yellow. Pending notifications are set up to be sent to users at a future date.
- Expired notifications are marked in gray. Expired notifications are no longer relevant; the time period during which the notifications were sent has ended.

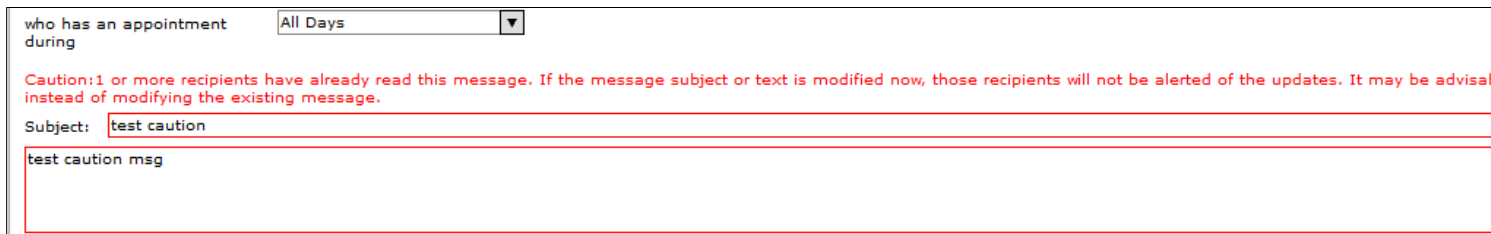
➡ **Note**— In cases where the message is to be delivered to carriers and/or suppliers, if the **All DCs** option is selected and no appointment statuses or date ranges are set, all carriers and suppliers will be notified. If particular DCs are selected and no appointment statuses or date ranges are set, only the carriers and/or suppliers in a party relationship with the selected DCs will be notified.

Editing Global Notifications

Users can edit existing messages from the **Global Notifications** list page by double-clicking or right-clicking on a message and selecting the **Edit Notification** right-click option.

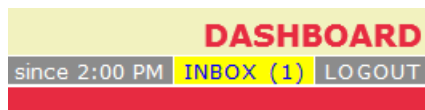
Users should exercise caution when editing a message which has already been acknowledged by one or more recipients; a message which is in effect might be acknowledged by a recipient before the edit is saved. Recipients who have acknowledged the previous version of the message will not receive an indication that the message has changed. Depending on the nature of the message, it may be advisable to create a new message instead of modifying the existing message.

DA Admins will receive the following warning notification when attempting to edit a global notification message that has been acknowledged by one or more users.



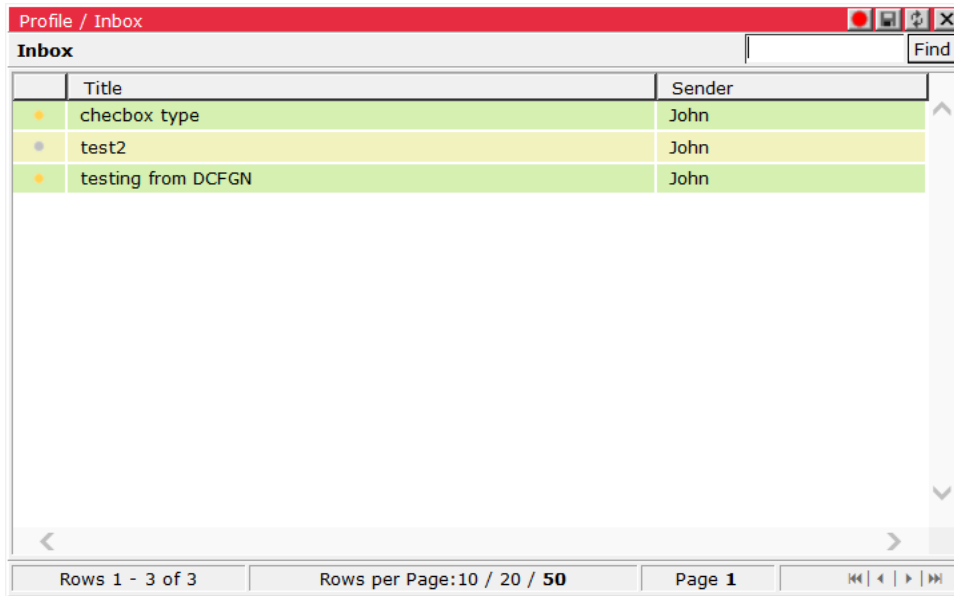
Receiving Messages

Notifications sent by the DA Admin will appear in the **Inbox** window. When new notifications are available, the **Inbox** button will be highlighted in yellow with the number of new notifications displayed in parentheses.

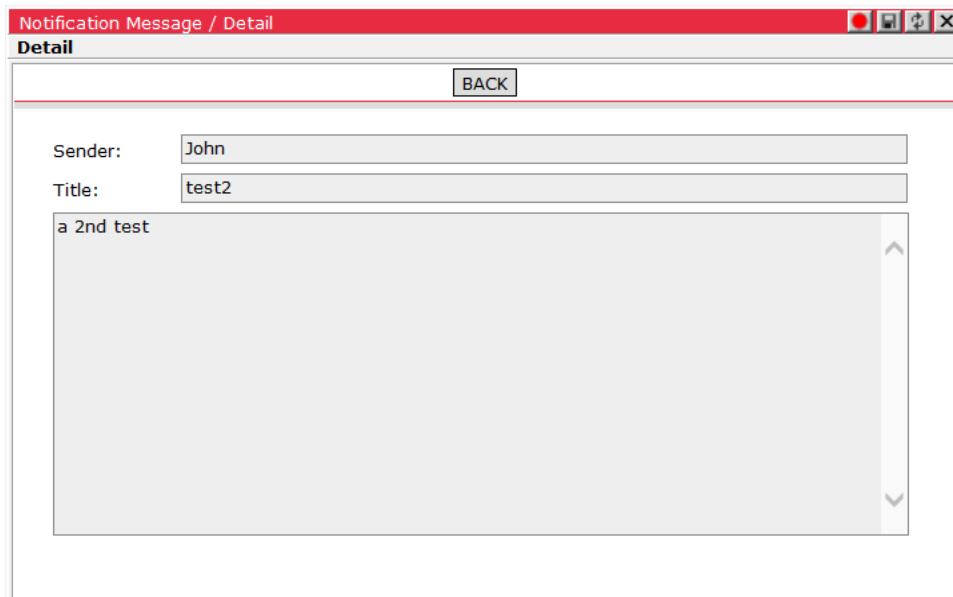


The **Inbox** window is displayed upon login for users with active global notification messages in their inbox. If the **Remember Me** checkbox is enabled for automatic logins, the **Inbox** window will display each time the application URL is entered in the browser and submitted.

Click the **Inbox** button to display all notifications in the **Inbox** window. Unread notifications are marked with an orange circle; notifications that have been viewed are marked with a gray circle.



Double-click on a notification to view it.



Click **Back** to return to the **Inbox** window.

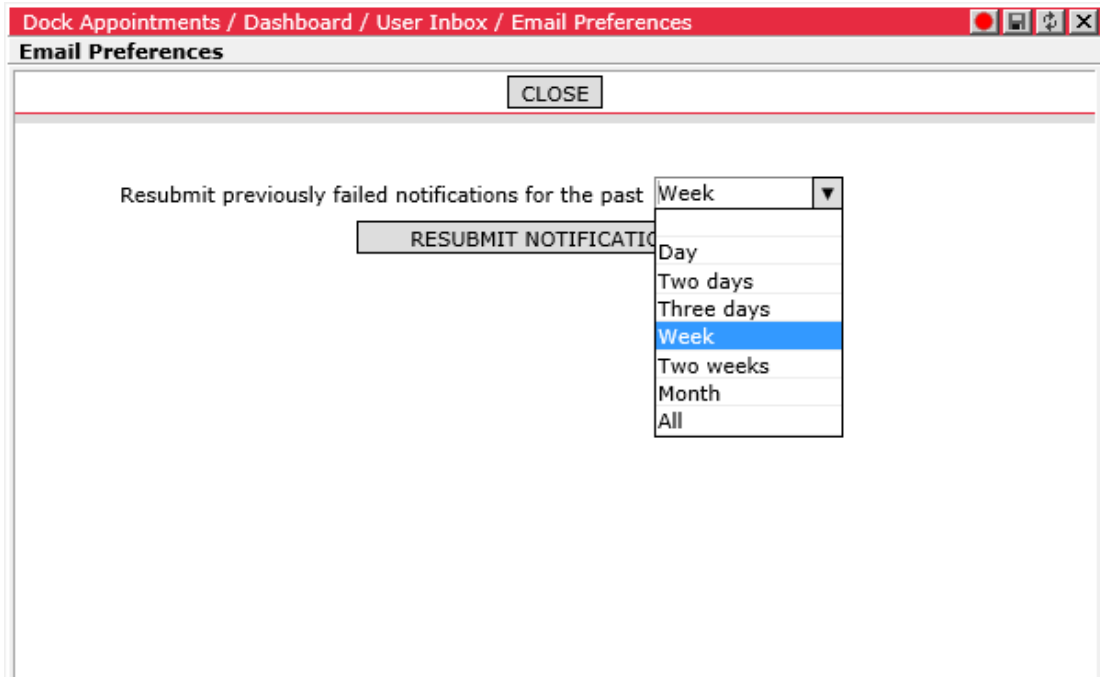
- **Note**— The system checks for new messages periodically and updates the unread number if any are found. If a user logs in with the **Remember Me** checkbox unselected and does not interact with the user interface for a certain period of time, the user interface will time out (30 minutes by default). After the user interface times out, the **Inbox** button will appear with (NA), displayed instead of an unread number, to notify the user that the system is no longer checking for new messages. When the user attempts to interact with the user interface again, the system will navigate her or him back to the login screen.

Resubmitting Failed Appointment Email Notifications

In cases where appointment email notifications are not processed correctly due to a failure of the email subsystem or an unforeseen email infrastructure issue, users are informed in the E-mail Notification column of an appointment's **Appointment History** page. DA Admin users can resend these failed notifications from the **Dock Appointments > Email Preferences** window within a configurable date range.

To resend failed appointment email notifications:

- 1 Select **Dock Appointments > Email Preferences**. The **Email Preferences** window appears.



- 2 Select a date range from the dropdown menu. To resubmit notifications for all failed notifications in the past, select **All**.
- 3 Click **Resubmit Notifications**. The system will find and reprocess the failed notifications within the specified date range.

➡ **Note**— This feature is designed to enable the resubmission of email notifications that did not process correctly and should not ordinarily need to be used.

Resubmitting Approved Appointments for Alternate Requested Date/Time

DA Admin users can resubmit approved appointments for another time or date from the **Appointment Details** page. When the appointment is resubmitted, it is placed in "Submitted" status with the reason code, "Re-Submitted by Global Admin", prompting the DC Admin to review and approve the appointment for the new Requested Date/Time value. If auto-scheduling is configured, this functionality will automatically trigger after an appointment is resubmitted by a DA Admin. As a result, the appointment may be auto-approved for the new Requested Date/Time value.

➡ **Note**— DA Admin users can still change the Requested Date/Time values and click **Update** to modify an "Approved" appointment. The resubmission functionality provides an alternative method to update the appointment.

Appointments resubmitted using this functionality will be handled the same as other "Submitted" status appointments in the system. The reason code distinguishes these appointments from other submitted appointments. To find appointments resubmitted by the DA Admin, users can sort appointments on the list by Reason Code.

| Saved On | Last Modified On | Status | Hot | Request # | PO # | Probill # | Requested Time | OOS | Reason Code | DC | Supplier | Carrier |
|---------------------------|-----------------------|--------|-----|-----------|-------------------------------|-----------|--------------------|-----|------------------------------|-----------|---------------------|--|
| 9/13/2016 8:34:59 AM GMT | 9/13/2016 4:34:59 AM | | | 1765366 | 1010102 1111112 | | 9/22/2016 10:00 AM | 0 | Re-Submitted by Global Admin | DSGtestDC | DSG_Supplier (TEST) | DSG Test Carrier (DSGT) - Descartes Systems Group& |
| 9/14/2016 11:49:59 AM GMT | 9/14/2016 9:49:59 PM | | | 1765402 | 1237442 | | 9/17/2016 3:00 AM | 0 | Re-Submitted by Global Admin | DC1emo | Supplier1emo (S1) | Carrier1emo (C1E) - Carrier1emoTA |
| 9/14/2016 11:54:56 AM GMT | 9/14/2016 9:54:56 PM | | | 1765403 | 1237442 | | 9/17/2016 8:00 AM | 0 | Re-Submitted by Global Admin | DC1emo | Supplier1emo (S1) | Carrier2emo (C2E) - TerminalA |
| 9/14/2016 1:21:12 PM GMT | 9/14/2016 11:21:12 PM | | | 1765404 | 1237382 1237378 1237458 | | 9/17/2016 3:00 PM | 0 | Re-Submitted by Global Admin | DC1emo | Supplier1emo (S1) | Carrier1emo (C1E) - Carrier1emoT |
| 11/5/2014 12:36:47 PM GMT | 11/5/2014 7:36:47 AM | | | 1761956 | rt63465 | | 11/5/2014 1:30 PM | 0 | Re-Submitted by DC | DSGtestDC | DSG_Supplier (TEST) | DSG_TEST_Carrier_2 (DSGT2) - Terminal 2 |
| 9/11/2015 12:46:37 PM GMT | 9/11/2015 8:46:37 AM | | | 1761957 | 4554546 | | 11/5/2014 1:50 PM | 0 | Re-Submitted by DC | DSGtestDC | DSG_Supplier (TEST) | DSG Test Carrier 3 (DSGT3) - Terminal 1 |

Note— The **Re-Submit** button for DA Admin users is always available on the **Appointment Details** page when an appointment is in "Approved", "Submitted" or "Delivery Failure" status. It behaves differently than the **Re-Submit** button displayed for carrier or supplier users. The **Re-Submit** button for carrier or supplier users is available when line items are added or removed, purchase order numbers are modified or when case quantities are updated.

To resubmit an approved appointment:

- 1 Double-click on an appointment in "Approved" status that needs to be resubmitted with a new Requested Date/Time value.
- 2 Change the Requested Date/Time value as required.

The screenshot shows the 'Appointment Details' page for Request # 1765404. At the top, there are buttons for UPDATE, RE-SUBMIT (circled in green), AUTO-APPROVE, APPROVE, REFUSE, CANCEL, DELETE, EMAIL, PRINT, and BACK. Below these are several form fields:

- Track as hot appointment:
- Yard Drop:
- Use standing appointment:
- Status: Submitted
- Reason Code: Re-Submitted by Global Admin
- Request Number: 1765404
- Requested By: CarrierUserEmo 1
- Requested Date/Time: 9/17/2016 3:00 PM (with a SUGGEST button)
- Estimated Unload Time: 04hr 42m
- Trailer #: [Empty]
- Select Equipment Type... [Dropdown]
- Routing #: [Empty]
- Carrier: Carrier1emo (C1E) - Carrier1emoT
- Supplier: Supplier1emo (S1) - Supplier1emo
- Contact: emo, Phone: emo
- Driver: Select Driver... [Dropdown]
- Preferred Carrier: Select Preferred Carrier... [Dropdown]

 A red note at the bottom states: "If load was brokered to you by a preferred carrier or you are a supplier tendering load to a preferred carrier - select carrier name in drop down box above". On the right side, there are fields for Ship To (DC1emo), Address, and a comment box with a 'COMMENT SAVED BY' column.

- 3 Click **Re-Submit**. The page will refresh, the appointment's status will be updated to "Submitted" and the Reason Code will be updated to "Re-Submitted by Global

Admin". If auto-scheduling is configured, the appointment may be auto-approved for the new Requested Date/Time value.

Using the Import Carriers/Suppliers Feature

DA Admin users can import and export suppliers and carriers in the system from the **Import Carriers/Suppliers** page. This functionality allows DA Admin users to more easily move party data between environments to create parties in large batches instead of individually through the user interface.

There are three sets of party fields that can be imported or exported, distinguished by the following types: Party (P), Location (L) and User (U). The header and fields are tab-delimited; in order for data to be imported correctly, the values on one row must be pre-faced by the proper type (P, L or U) and separated by one tab in the specified order.

| | | | | | | | |
|---|------------|---------------------|--------------|-------------------|------------|-----|--|
| P | ActionCode | PartyName | PartyCode | PartyType | PartyEmail | | |
| | PartyNotes | AutoScheduleEnabled | | | | | |
| L | ActionCode | LocationName | LocationCode | StreetAddressCity | State | Zip | |
| | Country | Contact | Phone Fax | LocEmail | LocNotes | | |
| | Directions | | | | | | |
| U | ActionCode | FirstName | LastName | LoginName | Password | | |
| | GenPass | EmailPrefBM | EmailAddress | ForcePswChange | | | |

Additionally, in order for the import to proceed, there must be at least one User (U) line in the import. Users can input several "P L" sequences, provided there is a "P L U" sequence somewhere in the import to establish the user group.

For example, the following import would not complete because there is no User (U) line in the sequence.

| | | | | | | | |
|---|------------|---------------------|--------------|-------------------|------------|-------|--|
| P | ActionCode | PartyName | PartyCode | PartyType | PartyEmail | | |
| | PartyNotes | AutoScheduleEnabled | | | | | |
| L | ActionCode | LocationName | LocationCode | StreetAddressCity | State | Zip | |
| | Country | Contact | Phone Fax | LocEmail | LocNotes | | |
| | Directions | | | | | | |
| U | ActionCode | FirstName | LastName | LoginName | Password | | |
| | GenPass | EmailPrefBM | EmailAddress | ForcePswChange | | | |
| P | AU | COLONIAL | FIRST | STATE | GLOBAL | ASSET | |
| | MGT | CFSG | 3 | | | | |
| L | AU | | CMO1 | | | | |
| | AU | | | | | | |
| P | AU | COLONIAL | FIRST | STATE | GLOBAL | ASSET | |
| | MGT | CFSG | | | | | |

3

```
L AU          CMO01          CMSGCMO01
  AU
```

However, in this example, the import will complete because it has a User (U) line in the sequence.

```
P  ActionCode  PartyName  PartyCode  PartyType  PartyEmail
   PartyNotes  AutoScheduleEnabled
L  ActionCode  LocationName LocationCode StreetAddressCity State Zip
   Country     Contact     Phone Fax   LocEmail   LocNotes
   Directions
U  ActionCode  FirstName  LastName   LoginName  Password
   GenPass     EmailPrefBM EmailAddress ForcePswChange
P  AU          COLONIAL  FIRST      STATE      GLOBAL     ASSET
   MGT         CMSG     3
L  AU          CMO1
   AU
P  AU          COLONIAL  FIRST      STATE      GLOBAL     ASSET
   MGT         CMSG
           3
L  AU          CMO01          CMSGCMO01
  AU
U  AU          Peter      Smith      psmith
```

Please note the following regarding User (U) type lines:

- When a user is imported in one user group that already exists and belongs to another existing user group, the system will update the user’s user group to the imported version.
- If the GenPass field is configured, a random password will be generated for the user.
- Set the ForcePswChange value to “1” to have the system prompt a new user to create a password for his or her account upon login.

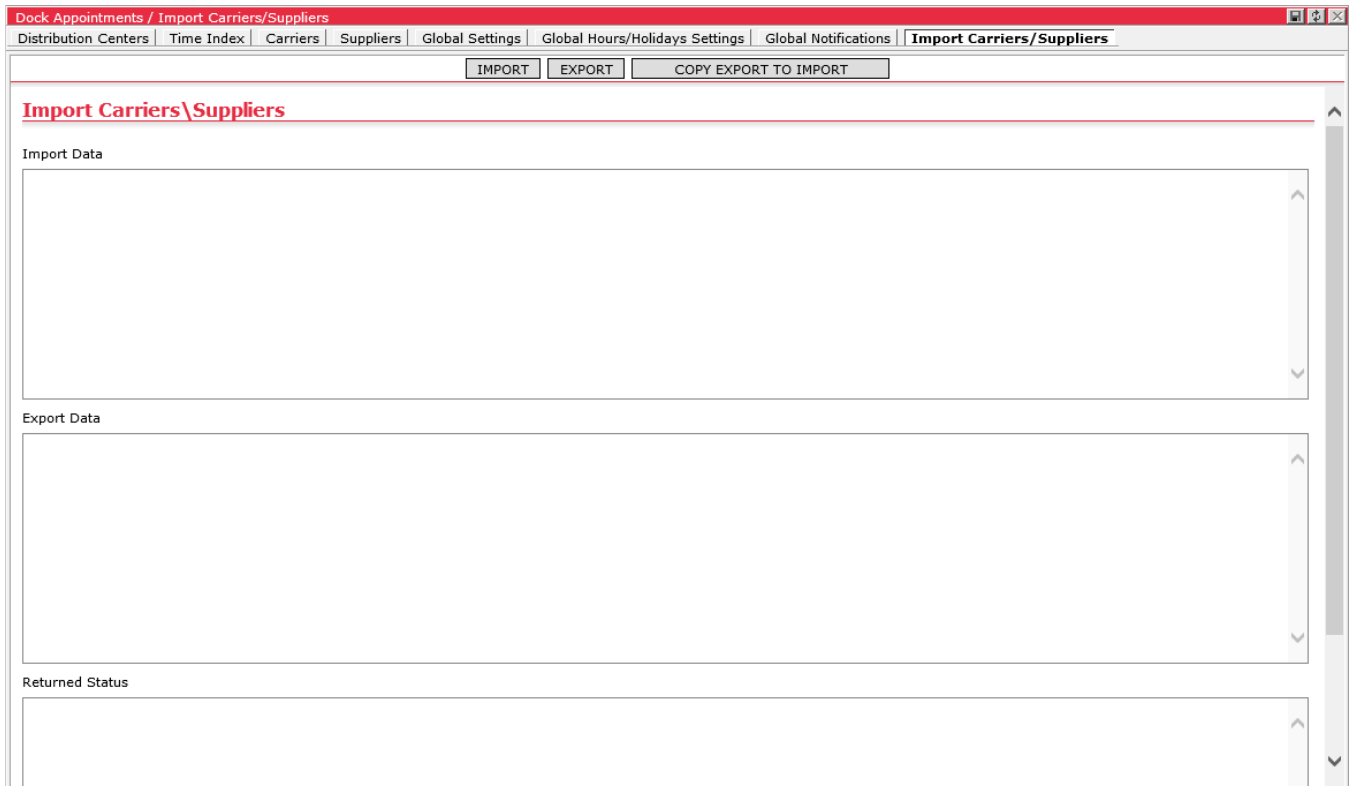
Please note the following regarding Party (P) type lines:

- If a carrier or supplier is imported with users specified and that carrier or supplier already exists, the system will create the users but *will not* add those users to the carrier’s or supplier’s user group. *The re-import of carriers and suppliers is not supported with this feature.*

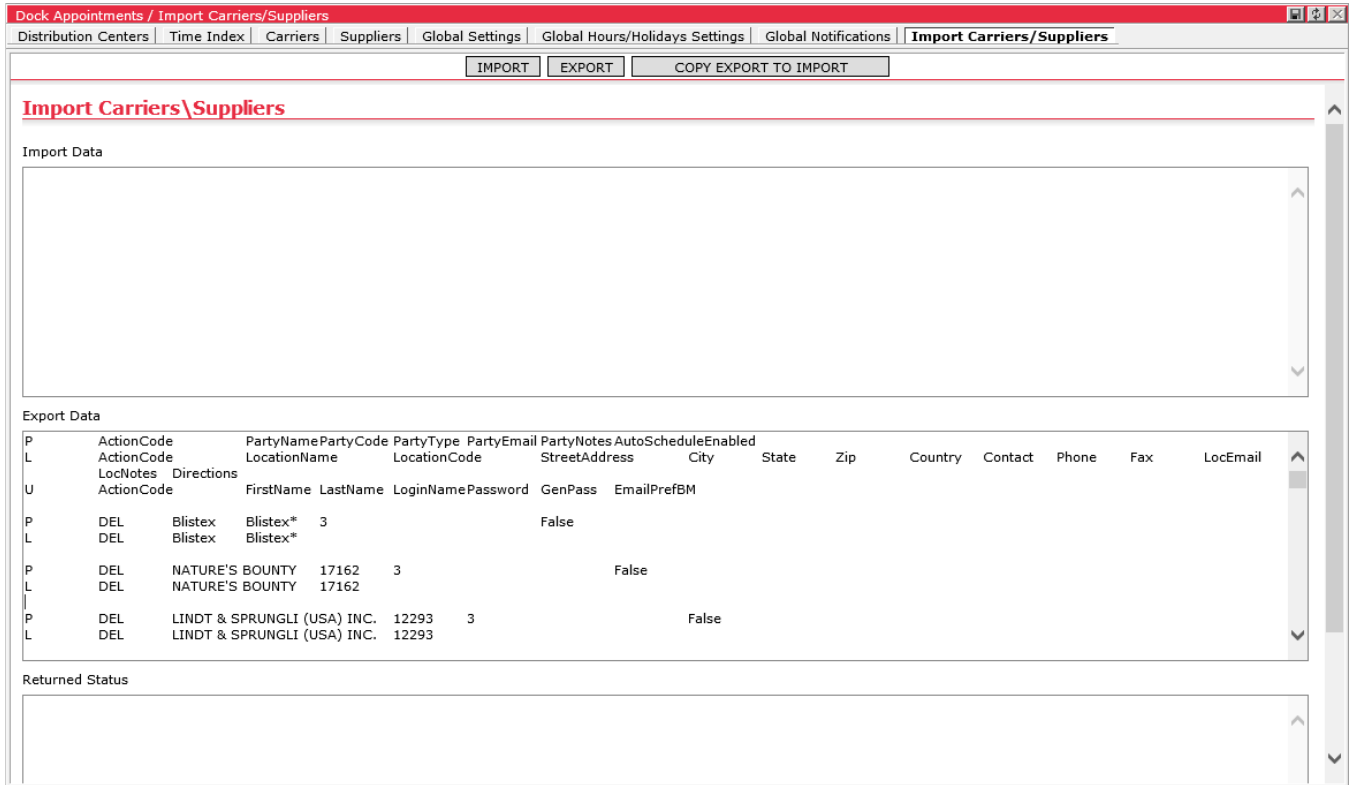
Moving Party Data from One Environment to Another

To move all carriers and suppliers from one Descartes Dock Appointments Scheduling environment to another:

- 1 Log in to both environments as the DA Admin, each in separate tabs.
- 2 Select **Dock Appointments > Setup > Import Carriers/Suppliers** from the main menu in both environments. The **Import Carriers/Suppliers** page appears.



- In the environment from which you wish to move data, click **Export** to populate the Export Data field with all carrier and supplier data in that system. This process may take several minutes depending on the number of carrier and supplier records.



- Once the Export Data field is populated, select and copy all data in the field pressing **Ctrl+A** (select all) and **Ctrl+C** (copy to clipboard) on the keyboard.
- Navigate to the other environment. Paste the export data copied to the clipboard in the Import Data field by pressed **Ctrl+V** (paste) on the keyboard.

- Click **Import**. When the import is complete, the Returned Status field is populated with the import status, including the number of party records created and/or updated.

Import Carriers\Suppliers

Import Data

| P | ActionCode | PartyName | PartyCode | PartyType | PartyEmail | PartyNotes | AutoScheduleEnabled | LocationName | LocationCode | StreetAddress | City | State | Zip | Country | Contact | Phone | Fax | LocEmail | |
|---|------------|-----------------------------|-----------|-----------|------------|------------|---------------------|--------------|--------------|---------------|------|-------|-----|---------|---------|-------|-----|----------|--|
| L | | | | | | | | | | | | | | | | | | | |
| U | | Directions | FirstName | LastName | LoginName | Password | GenPass | EmailPrefBM | | | | | | | | | | | |
| P | DEL | Blistex | Blistex* | 3 | | False | | | | | | | | | | | | | |
| L | DEL | Blistex | Blistex* | | | | | | | | | | | | | | | | |
| P | DEL | NATURE'S BOUNTY | 17162 | 3 | | False | | | | | | | | | | | | | |
| L | DEL | NATURE'S BOUNTY | 17162 | | | | | | | | | | | | | | | | |
| P | DEL | LINDT & SPRUNGLI (USA) INC. | 12293 | 3 | | False | | | | | | | | | | | | | |
| L | DEL | LINDT & SPRUNGLI (USA) INC. | 12293 | | | | | | | | | | | | | | | | |

Export Data

Returned Status

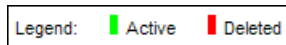
~All Parties imported successfully.
Created: 0
Updated: 4

DC Admin Tasks

The DC Admin can do the following tasks, in addition to the tasks performed by a coordinator:

- Set up the distribution centers (DCs, carriers and suppliers)
- Set up new users for DCs, carriers and suppliers
- Set up party relationships
- Set carrier and supplier users as Party User Admins
- Set the Global Settings
- Delete users from DC's, carriers and suppliers
- Delete DC's, carriers and suppliers
- Import and export DC's

➡ **Note**— There is a legend above the **Distribution Centers, Carriers** and **Suppliers** list pages which specifies Active and Deleted items for clarity.



Creating a Distribution Center

DC Admins should have the following information before they create a DC:

- Name of location (including a preferred short name)
- Address
- Coordinator's names, emails, phone and fax numbers
- Shift times
- Dock door names and ranges

➡ **Note**— Make sure that you use the same prefixes and numbering that is used for your existing doors and reports used.

- Holidays and hours
- Screen Instructions (typically the same as the hardcopy used today)
- Location email preferences

➡ **Note**— Fields displayed on the distribution center pages will differ depending on the client's template.

To create a distribution center:

- 1 From the main menu, select **Dock Appointments > Setup > Distribution Centers**. The **Distribution Centers** page/tab displays.

| Dock Appointments / Distribution Centers | | | | | | | | | | | | |
|--|---------------|--------------|-------------------|----------|-------|-----|---------|-----------|--------------|--------------|-------|---------|
| Distribution Centers | | | | | | | | | | | | |
| DC Name | Facility Code | Coordinators | Street Address | City | State | Zip | Country | Time Zone | Phone | Fax | Email | Has Use |
| DSG Test DC | TEST | | 120 Randall Drive | Waterloo | | | US | EST | 404-555-8888 | 404-555-8880 | | Yes |

2 Right-click and select **New Distribution Center** from the menu. The **New Distribution Center** page is displayed.

Dock Appointments / Distribution Centers / New Distribution Center

New Distribution Center [SAVE] [CANCEL]

Distribution Center Setup

DC Name: Facility Code:

Street Address:

City/State/Zip:

Country:

Time Zone:

Coordinator Names:

Phone: Fax:

YM Enabled:

Sync Trailer Status:

YM Refresh Rate: min(s) (Default = 2 min)

Auto-Scheduling Enabled:

PO Early Tolerance: day(s)

PO Late Tolerance: day(s)

PO Delivery Location Code (VIZ):

Exclusive Destination:

Custom Fields

:

:

DC Users

| User Name | Email Address | User Type |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Send Email When... an appointment request is submitted by carrier/supplier
 an appointment request is submitted with PO warnings
 an appointment is cancelled by carrier/supplier
 an appointment is re-submitted by carrier/supplier
 an appointment is updated by carrier/supplier after approval
 a comment is added to the appointment by carrier/supplier
 a appointment request is deleted
 CC on the appointment updates made by this party

[NEW] [DELETE] [EDIT USER]

Location Email Preferences

Email Address:

Send Email When... an appointment request is submitted by carrier/supplier
 an appointment request is submitted with PO warnings
 an appointment is cancelled by carrier/supplier
 an appointment is re-submitted by carrier/supplier

3 Under **Distribution Center Setup**, enter the distribution center's name, facility code, street address, city/state/zip, country, coordinator names, phone, fax and associated URLs in the Custom Fields section.

Note— Facility codes can be used to represent sub-areas, rental warehouses, etc. that are managed by one location. If a secondary location has different hours, doors, etc., create a separate DC and give the Coordinator visibility to both by adding the coordinator to both user lists.

The information under **Distribution Center Setup** will show on the printed appointment. It is advised that an appointment be printed after the DC is set up to validate the information.

- i Tip**— If two coordinators work at the DC, enter both names in the Coordinator Name field.
- 4** Select the **Auto-scheduling enabled** checkbox to activate auto-scheduling logic for the new DC.
 - 5** Set the PO Early tolerance and PO Late Tolerance. The tolerance values set the DC values when calculating tolerance dates. Use the PO Delivery Location Code field to allow the PO Search to match Vendor Codes set for Descartes Dock Appointments Scheduling Suppliers, PO Delivery location code set for a DC and the date range specified in the search.
 - 6** If the DC is an “exclusive destination”, select the **Exclusive Destination** checkbox and enter a unique PO Delivery Location Code value. For more information on “exclusive destination” functionality, please see the [Managing Exclusive Destination DCs \(Template-C\)](#) section.
 - 7** Under **DC Users**, select a user name and select the user type.
If the user is not listed, select **Not in List**. The **Create User** page is displayed. For more information on setting up a new user, see the [Setting Up New Users for the Parties](#) and the [Setting a Carrier or Supplier User as Party User Admin](#) sections.
↻ Note— A Distribution Center has four different types of users:
 - DC Admin
 - Coordinator
 - Check-In
 - View Only
 - 8** Enter user email addresses. Multiple email addresses can be added, separated by semi-colon. Select the appropriate **Send Email When** check boxes.
Select the **CC on the appointment updates made by this party** to have a carbon copy of the email notification sent to specified user email addresses on the DC side. For example, if a DC user (admin or coordinator) updates an appointment, normally the email notification would only be sent to the carrier/supplier parties involved. With this option selected, DC users subscribed via the CC functionality would also receive an email notification reporting this update.
 - 9** Click **New** to add additional distribution center users.
 - 10** Under **Location Email Preferences**, enter the location's email address. Multiple email addresses can be added, separated by semi-colon. Select the appropriate **Send Email When** check boxes.
 - 11** Click **Save** to save the new distribution center.

Managing Exclusive Destination DCs (Template-C)

Clients using Template-C of Descartes Dock Appointments Scheduling can set individual distribution centers (DC) as “exclusive destinations” to ensure that purchase orders (PO) addressed to these DCs are delivered to the specified DC and only the specified DC.

Configuration

When POs are added to an appointment in Descartes Dock Appointments Scheduling, the system uses the PO Delivery Location Code from Descartes Visibility and Event Management (or any other external PO data source configured for an implementation) included with each PO number to validate POs against the selected distribution center.

Occasionally, these PO Delivery Location Codes are shared across DCs. In this case, when the system validates a PO's destination DC against the DC selected for an appointment, any one of the DCs that share the PO Delivery Location Code are considered valid destinations for the PO.

To ensure that the PO Delivery Location Code of a DC is unique, the **Exclusive Destination** setting has been added to the **Distribution Center Details** page. When this setting is enabled, users must specify a PO Delivery Location Code value that is unique to the DC in the PO Delivery Location Code (VIZ) field.

Distribution Center Setup

DC Name: DSG Test DC X Facility Code: TEST

Street Address:

City/State/Zip:

Country: ▼

Time Zone: (GMT-05:00) Eastern Time (US and Canada) ▼

Coordinator Names:

Phone: Fax:

YM Enabled:

Sync Trailer Status:

YM Refresh Rate: min(s) (Default = 2 min)

Auto-Scheduling Enabled:

PO Early Tolerance: day(s)

PO Late Tolerance: day(s)

PO Delivery Location Code (VIZ): RX

Exclusive Destination:

This unique code allows the system to perform validation to ensure that POs addressed to the DC are only delivered to that DC.

Configuration specialists can use text-keys to customize the text used for labels and messages in this feature. These text-keys are listed in [Appendix E: Text-Key Definitions](#).

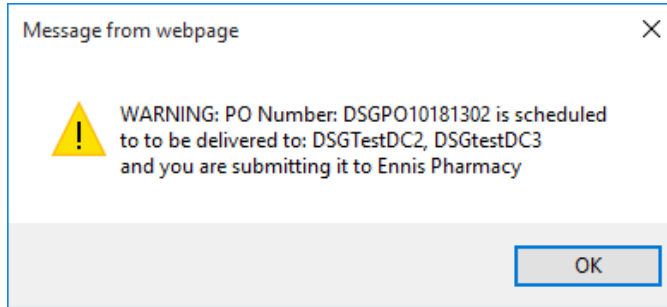
Appointment Validation

An additional validation step has been added to the **Create Appointment Request** and **Appointment Details** pages to ensure that POs bound for "exclusive destination" DC are scheduled for and delivered to the correct destination.

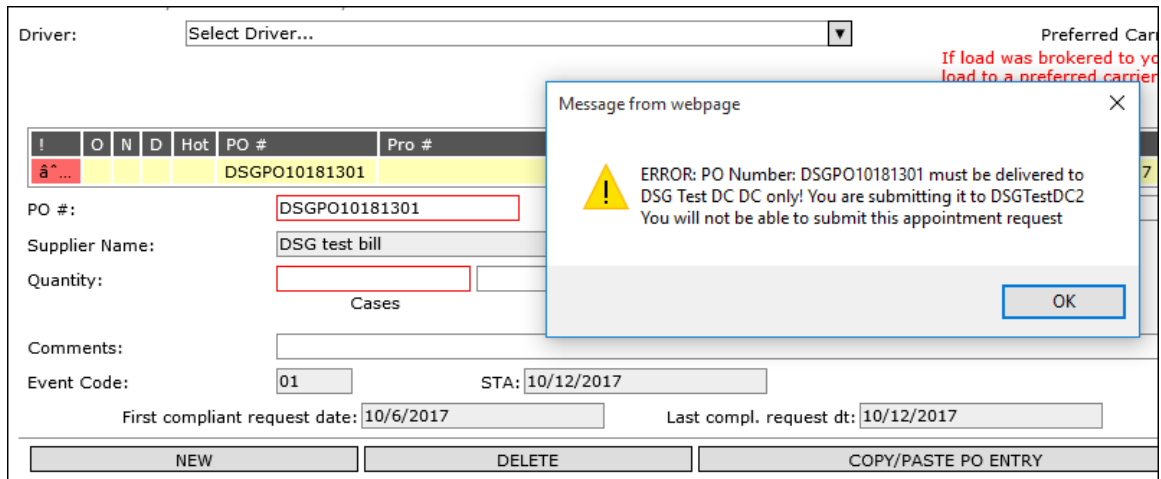
This additional validation step is performed in sequence as follows:

- When users add a PO to an appointment request, the system compares the PO's destination DC to the DC selected in the appointment request.
 - If the destinations match, validation is completed and the PO is added.
 - If the destinations do not match, the system will check if the PO's destination DC is marked as an "exclusive destination":
 - If the PO's destination DC *is not* an "exclusive destination", the system will return the following warning message as in previous versions. Users can

continue to edit the appointment request, but will continue to receive warning messages each time such a PO is added.



- If the PO's destination DC is an "exclusive destination", the system will return the following warning message: "The PO [PO Number] must be delivered to EXCLUSIVE DC [DC name]. You will not be able to submit this appointment request to DC [DC name]." Users can continue to edit the appointment request, but will continue to receive warning messages each time such a PO is added.



- When users attempt to submit or update an appointment request with POs scheduled for an "exclusive destination" DC other than the DC selected in the appointment, the system will prevent the submission or update and display the following error message: ""These PO(s): [PO Numbers] cannot be delivered to [DC name]".

As a part of this feature, the submitExternalAppointmentRequest API will validate POs bound for "exclusive destination" DCs.

Door Schedule Setup

From the **Door Schedule Setup** page, users can create door ranges and specify the operating hours and holidays for DCs.

The screenshot shows the 'Door Schedule Setup' window with the following sections:

Door Ranges

| Order | Section | Door Prefix | Range Start | Range End | X-Dock Sorter |
|-------|---------|-------------|-------------|-----------|---------------|
| 1 | A | | 25 | 38 | |
| 1 | A | | 25 | 38 | |

Buttons: NEW, DELETE

Interval and Rounding Settings

Minimum service duration interval in minutes (Default = 15):

Default appointment duration (for manual approval):

Hours and Holidays

| Title | Type | Doors | Days | Start Time | End Time |
|-------------------|------------------------------------|-------|---|------------|----------|
| Operating Hours | Operating Hours (Start/End of Day) | | .MTWHF. | 5:30 AM | 2:30 PM |
| weekend | Window Closed (Break) | | U. . . . S | 12:00 AM | 11:45 PM |
| July 4th | Day Closed (Holiday) | | 7/3/2020 | | |
| Labor day | Day Closed (Holiday) | | 9/5/2011 | | |
| Thanksgiving | Day Closed (Holiday) | | 11/24/2011 | | |
| Christmas Holiday | Day Closed (Holiday) | | 12/25/2013 | | |
| test holiday | Day Closed (Holiday) | | 5/13/2013 | | |
| test day | Day Closed (Holiday) | | . M. W. . . 5/1/2013 to 5/31/2013 | | |

Buttons: MOVE UP, MOVE DOWN

Title:

Window Type: Start: End:

Apply To:

Select Day(s):

Weekday(s): Sun Mon Tue Wed Thu Fri Sat

Buttons: NEW, DELETE

- 1 In the Door Ranges section, enter order, section, door prefix, range start and range end. If X-Dock functionality is enabled, select a sorter to assign to desired door ranges. For more information on the X-Dock feature, see the [Cross Dock Setup \(Template-M\)](#) section.

For example, if the DC has doors on both sides of the building with one side being North and the other South and they are numbered 1-10 (five on each side), you would enter a door range for N1, N2, etc. and S1, S2, etc. In this case, the doors on the north side start (are open) at 6 a.m. and end (close) at 5 p.m. while the doors on the south side start at 8 a.m. and end at 7 p.m. Therefore, the first door range would be, door prefix N1, range start 6 a.m. and range end 5 p.m.

- 2 Click **New** to add additional door ranges and **Delete** to remove existing door ranges in the list.
- 3 In the Hours and Holidays section, enter the title. Select or enter the window type, start and end hours. From the dropdowns, select the location to apply the hours to and the days to apply it.

Use the **Move Up** and **Move Down** buttons to prioritize entries in the list. Records are processed from top to bottom. Specify days of the week using the checkboxes provided.

➔ **Note**— Hours and holidays can be set at the local level as well as the global level by an administrator user. Please see the [Setting Up Global Hours/Holidays](#) section for more information.

- 4 Click **New** to add additional hours and holidays and **Delete** to remove existing entries.
- 5 Set the Minimum Service Duration for the new DC for five, 10 or 15 minutes using the dropdown. When users select the DC from the list of Ship To items on the Appointment Details page, the specified minimum service duration will apply to the appointment time calculations.
- 6 The **Default appointment duration** setting allows you to select the default duration time for manual approval of an appointment. You can select a value of up to three hours or, for clients using Template-C or Template-M, select the **-use calculated-** option to set the initial appointment duration to the calculated value. Template-W does not support auto-scheduling and cannot estimate appointment duration.

When minimum service duration interval is changed:

- The selected Default appointment duration value must be rounded to the nearest valid option
- The **Default appointment duration** dropdown list must be regenerated accordingly

The **Door Assignments** page uses these values. When an appointment is manually approved, the initial appointment duration is set to one of the following:

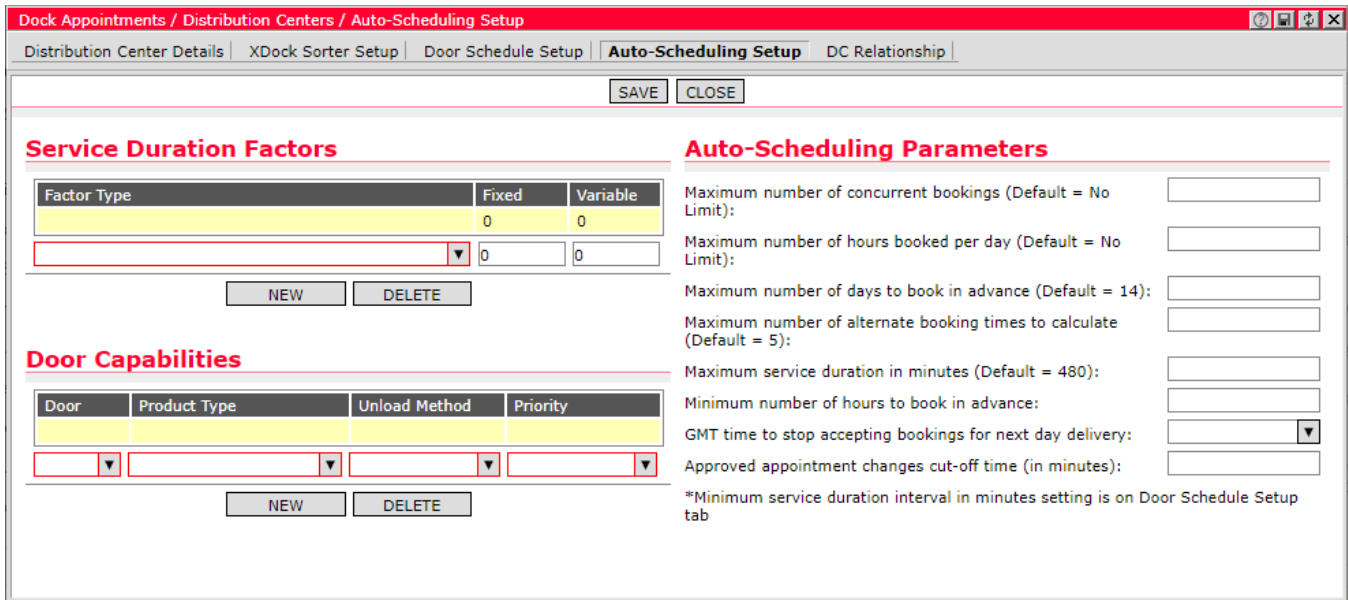
- Previous approved duration, i.e., an approved appointment that has been rescheduled
- The **Default appointment duration** value configured at the DC (up to three hours from the Minimum Appointment Duration)
- The calculated duration if **Default appointment duration** is set to **-use calculated-**

Configuring Auto-Scheduling Setup

Auto-Scheduling Setup allows the user to configure the system to pre-populate and validate appointment web forms with order and shipment details.

To configure Auto-Scheduling Set-up:

- 1 Click the **Auto-Scheduling Setup** tab from the **Distribution Center Details** page. The following page appears:



2 The user can then edit the following parameters:

- **Service Duration Factors:** Select the factor type from the dropdown list and enter the variable time in seconds per each item, or fixed time in seconds per each occurrence. All of these times are summed up while processing an appointment request to calculate the service time. The time is then rounded off to the next multiple of the service duration interval. Service duration interval is configured under the auto-scheduling parameters on the same page and is 15 minutes by default.
- **Door Capabilities:** Configure the ability of doors to accept certain types of products and unload methods. A priority value 1 implies that this is the preferred door for the specified product type and unload method. A priority value 3 implies that this door be considered for the specified product type and unload method after doors with priority 1 and 2 have been considered. Click **New** to create a new entry and use the fields to specify the Product Type, Unload Method and Priority. Click **Delete** to remove an existing door.
- **Auto-Scheduling Parameters:** These parameters govern the auto-scheduling process at a DC and set some boundary constraints for auto-scheduling appointment requests.
 - **Maximum number of concurrent bookings:** When the number of appointments in a given service duration interval, typically 15 minutes, reaches this number, then no new appointment requests are auto-scheduled in this time window. By default, no limit is set for this.
 - **Maximum number of hours booked per day:** When the number of hours booked in a day across all doors reaches this number, no further

appointment requests are auto-scheduled for this day. By default, no limit is set for this.

- **Maximum number of days to book in advance:** This is the number of days to look ahead of the current day when the system looks for available doors to schedule an appointment. This is also the maximum number of days out that a carrier can request an appointment. By default, this value is set to 14.
- **Maximum number of alternate booking times to calculate:** When no compatible door is available for the requested time, this value determines the maximum number of booking times to calculate and show to the carrier. By default, this value is set to 5.
- **Minimum service duration interval in minutes:** Appointments are granted in multiples of this unit. The service duration is also rounded off to the next multiple of this unit. By default, this value is set to 15 minutes.
- **Maximum service duration in minutes:** To catch errors in typing, the maximum calculated service duration is capped at this value. Appointment requests exceeding this service duration will be submitted for manual approval. By default, this duration is set to 480 minutes or 8 hours.
- **Minimum number of hours to book in advance:** When this value is set, the carriers are required to request appointments at least this number of hours in advance. The requested date and time must be at least this number of hours ahead of the current DC time before the carrier can submit the request. No default value is set for this.
- **GMT time to stop accepting bookings for next day delivery:** When this value is set, appointment requests for next day deliveries can be made until this time in local DC time zone. After this time, the carriers cannot submit requests for the following day deliveries. No default value is set for this.
- **Approved appointment changes cut-off time (in minutes):** You can set a cut-off time at the distribution center (DC) level to limit last-minute edits and cancellations by carrier or supplier users. This field can be found on the **Auto-Scheduling Setup** page and is set in minutes.

When a carrier or supplier user attempts to update an approved appointment where the appointment would have to be resubmitted (e.g., a critical change was made), the system checks the configured cut-off time of the DC selected in the **Ship To** dropdown on the **Appointment Details** page. If the approved appointment time is beyond the set cut-off time window, an error message is returned stating that "Appointment Re-Submission is not allowed with less than X minutes before the appointment time. [Current DC Time] [Approved Appointment Time] You have to contact DC directly."

Similarly, the system will use the cut-off time value to prevent appointments from being cancelled by carrier or supplier users beyond the configured cut-off time window. When the **Cancel** button is clicked, the system checks the configured cut-off time of the assigned DC and does the following if the approved appointment time is beyond the cut-off time window:

- Displays an error message
- Disables the **Save** button on the **Cancel** window

Dock Appointments / Appointment Details - Approval# 2261547 / Cancel

Cancel

SAVE CANCEL

⚠ Approval# 2261547: cannot cancel with less than 1 hrs. DC time: 7/10/2019 12:02 PM. Appointment time: 4/14/2014 8:00 AM. Time zone: (GMT+10:00) Canberra, Melbourne, Sydney

Reason Code:

Comment:

➡ **Note**— The cut-off time check is only performed for approved appointments. Carrier and supplier users can update or cancel submitted (but not yet approved) appointments without restrictions.

- 3 Click **Save** to keep your edits or **Close** to discard them and return to the **Distribution Centers** page.

Cross Dock Setup (Template-M)

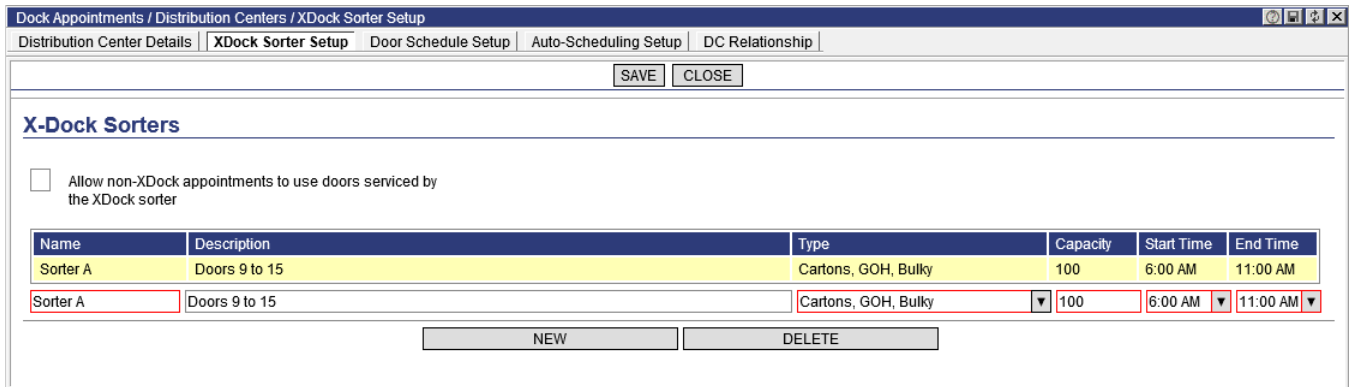
Descartes Dock Appointments Scheduling allows Template-M users to create “sorters” to account for delivery units that will not be stored in the warehouse but loaded on another trailer for delivery instead. Users can establish the types of products and how many units per hour a sorter can handle, and then assign these

sorters to door ranges. X-Dock products are marked at the appointment line level and auto-scheduling will handle X-Dock sorting during the scheduling process.

X-Dock Sorter Setup

To create new X-Dock sorters for a distribution center:

- 1 From the **Distribution Center** list page, right-click on a distribution center and select **XDock Sorters** from the right-click menu. The **XDock Sorter Setup** tab displays.
- 2 Click the **Allow non-XDock appointments...** checkbox to allow non-X-Dock appointments to be auto-assigned during the auto-approval process to doors at the distribution center that are serviced by an X-Dock sorter. When disabled, only appointments with X-Dock items can be assigned to these doors.



- 3 Enter the following values:

- Name
- Description
- **Type:** Specifies the type of products the sorter can process. This value is linked to one of three values on the Template-M appointment line, Cartons, GOH (Garments on Hangers) and Bulky. For example, if an appointment has an ASN or purchase order with Cartons that needs to be cross docked, the appointment is scheduled at the door serviced by the sorter with Cartons set as the Type. Sorters can be set to handle multiple product types from the dropdown.
- **Capacity:** Specifies the number of units the sorter can handle per hour regardless of the unit type. For example, if PO1 has 100 X-Dock cartons and PO2 has 200 X-Dock GOH on the appointment, then the total appointments load is 300 X-Dock units. In this case, if the X-Dock sorter is set to handle both item types and its capacity is set to 600 units, then the sorter could process this appointment in 30 minutes.
- Auto-scheduling will ensure that the sorter is able to sort the appointment load before the end of its working day.

- **Start Time:** Specifies the time at which the sorter begins operating.
 - **End Time:** Specifies the time at which the sorter no longer operates.
- 4 Click **New** to add a sorter or **Delete** to remove a sorter.
 - 5 Click **Save** when finished.

Once sorters are created for a distribution center, users can then assign them to doors in the Door Ranges section of the **Door Schedule Setup** page. From the dropdown, select the sorter you wish to assign to a particular door.

The screenshot shows the 'Door Schedule Setup' window with the following components:

- Navigation:** 'SAVE', 'CLOSE', and 'VIEW DOOR ASSIGNMENTS' buttons.
- Door Ranges Table:**

| Order | Section | Door Prefix | Range Start | Range End | X-Dock Sorter |
|-------|---------|-------------|-------------|-----------|---------------|
| | | | 1 | 3 | Sorter 1 |
| | | | 4 | 8 | |
- Form Fields:** Below the table, there are input fields for 'Range Start' (value: 1), 'Range End' (value: 3), and a dropdown for 'X-Dock Sorter' (value: Sorter 1). 'NEW' and 'DELETE' buttons are present.
- Hours and Holidays Table:**

| Title | Type | Doors | Days | Start Time | End Time |
|-------------|------------------------------------|-------|------|------------|----------|
| Open Hours* | Operating Hours (Start/End of Day) | | | 7:00 AM | 1:00 PM |
- Form Fields:** Below the table, there are fields for 'Title' (Open Hours*), 'Window Type' (Operating Hours (Start/End)), 'Start' (7:00 AM), 'End' (1:00 PM), 'Apply To' (Entire Facility), and 'Select Day(s)' (All Days). 'MOVE UP' and 'MOVE DOWN' buttons are also present.
- Interval and Rounding Settings:** A section with a label 'Minimum service duration interval in minutes (Default = 15):' and a dropdown menu set to '15'.
- Buttons:** 'NEW' and 'DELETE' buttons are located at the bottom right of the 'Hours and Holidays' section.

Viewing X-Dock PO Lines on an Appointment

In the appointment line items sections of the **Create Appointment Request** and **Appointment Details** pages, purchase orders that contain products that will be handled by X-Dock sorters are marked with the label "(XDock Sorter: <product type>)" and an icon. Both the label and the icon are configurable.

| ! | Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Cartons | GOH | bulk1 | Order Type |
|---|-----|-----------------|------------------|------------|----------------|----------|---------|-----|-------|------------|
| * | | TEST_PO_1999515 | TEST_BOL_1999515 | ID | ShSupplier1emo | | 9 | 8 | 12 | BOL_UDF8 |

| | | |
|---|---|-------------------------|
| Supplier: | Supplier1emo (1D) - ShSupplier1emo | |
| PO #: | Not in List.. | TEST_PO_1999515 |
| ASN #: | Not in List.. | TEST_BOL_1999515 |
| Supplier Name: | ShSupplier1emo | Class Group: 8 |
| Order Type: | BOL_UDF8 | EQ Order Type: BOL_UDF7 |
| SSCC Qty: (XDock Sorter: Cartons) | <input type="text" value="9"/> <input type="text" value="8"/> <input type="text" value="12"/> <input type="checkbox"/> Hot Item | Ad Date: 4/1/2014 |
| | Cartons | GOH bulk2 |
| Comments: | | |
| <input type="button" value="NEW"/> <input type="button" value="DELETE"/> <input type="button" value="MULTIPLE PO ENTRY"/> | | |

Auto-Scheduling of X-Dock Units

The auto-scheduling process supports X-Dock sorting. For each incoming X-Dock appointment request, auto-scheduling identifies the X-Dock sorters capable of handling all X-Dock type of units found on the appointment. If no sorters capable of handling the X-Dock appointment are found, then the appointment cannot be auto-scheduled.

In previous versions of Descartes Dock Appointments Scheduling, as the first step in the auto-scheduling process, the system attempted to find a set of doors potentially capable of handling the appointment by matching door capability to the appointment's properties. With the X-Dock enhancement to the auto-scheduling process, this set of doors is also filtered to remove doors that are not linked to capable sorters.

Once the system finds doors potentially capable of handling the appointment and these doors are serviced by a capable X-Dock sorter, the system builds a "current load" schedule for each sorter. This "current load" schedule is represented by an array of time buckets. Each bucket represents one 15-minute time interval during which the sorter is active. For example, if the sorter is active from 9:00 a.m. until 1:00 p.m., this span would include 16 interval buckets (four hours divided by 15 minutes).

Then the system collects all “Approved”, “Arrived” and “Departed” X-Dock appointments for the day assigned to any of the doors serviced by the sorter. These appointments are arranged in chronological order. In the next step, the system “emulates” the process of unloading and sorting these appointments one by one. During this process, the total number of X-Dock units on the appointment is distributed into appropriate buckets on the sorters “current load” schedule.

Once the “current load” schedule is built, the system can analyze a new incoming appointment request to determine if the sorter has enough capacity left in the day to process the appointment’s X-Dock load.

- ➡ **Note**— This check is applied just before the appointment is auto-approved for the requested time or when alternative appointment times found are validated by the existing auto-scheduling process. If the check fails, the appointment is not auto-approved or the alternative appointment time is rejected and the search continues.

The auto-scheduling process considers sorter capacity per hour, one day at a time. The X-Dock sorter capacity validation is applied to the appointment slot found by the existing auto-scheduling logic and confirms that the corresponding sorter has enough capacity left before the end of the day to process the appointment’s X-Dock load (even if this capacity comes much later in the day). If the sorter does not have enough capacity, then the appointment slot found is rejected and the auto-scheduling continues to search for a valid slot.

An appointment releases its X-Dock units in a linear manner prorated to the appointment duration. For example, if an appointment has 200 X-Dock units on the appointment and the appointment duration is one hour, then the system assumes that the appointment will add 50 X-Dock units to the X-Dock sorter staging area for four consecutive 15-minute intervals starting from the appointment time. There is no limit on the number of X-Dock units which could accumulate in this staging area before the sorter(s) become active and during the working hours of the sorter.

To illustrate this functionality, please consider the following examples.

X-Dock Auto-scheduling Examples

The following criteria apply to all examples in this section.

- The sorter can handle 100 X-Dock units per hour or, 25 units per 15-minute interval
- The sorter is active from 9:00 a.m. to 1:00 p.m. The active hours are represented by the table cells highlighted in green below.
- One appointment, 001, has been approved at 8:30 a.m. for 1.5 hours. Appointment 001 is represented by the cells highlighted in purple below.
- Appointment 001 delivers 240 X-Dock units.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 am | | | | 1 pm | |
|--------------|------|---|------------------|---|----------------------------|---|---|---|-------|----|----|----|-------|----|----|----|-------|----|----|----|------|--|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | |
| Staging Area | | | | | | | | | | | | | | | | | | | | | | |
| App "001" | | | 240 X-Dock units | | | | | | | | | | | | | | | | | | | |
| Sorter Load | | | | | X-Dock sorter active hours | | | | | | | | | | | | | | | | | |

First, the system will calculate the current sorter load. This occurs before any new auto-approved appointment requests are received. In this example, the first appointment, Appointment 001, begins unloading at 8:30 a.m. at a rate of 40 units per interval (240 units/6 intervals). The system then applies the load from Appointment 001 to the sorter's "current load" schedule, interval by interval. The number in each of the appointment's intervals represents the unload rate, or the number of units unloaded from the trailer during each 15-minute interval.

At 8:30 a.m. the appointment arrives and the unloading process begins. Since the sorter is not operational until 9:00 a.m., during Intervals #3 and #4, the X-Dock units are unloaded at 40 units per interval and are accumulated in the sorters staging area. By 9:00 a.m., 80 units have been unloaded and are located in the staging area.

During the next interval, Interval #5, 40 units are unloaded from the trailer and 25 units are processed by the sorter. By the end of the Interval #5, 95 units (80 + 40 - 25) are located in the staging area and 25 units are placed into the sorter's "current load" bucket. Bucket #5 is filled to max capacity for that interval.

The same unloading and sorting processes run in parallel until 10:00 a.m. By this time, the appointment is finished unloading all 240 X-Dock units. Only 100 units have been processed by the sorter by this time (one hour = four 15-minute intervals, 25 units per interval). One-hundred and forty units remain in the staging area. These 140 units will be processed by the sorter over the next six intervals. Note that the sorter is only partially loaded in the Interval #14, since only 15 units must be processed at that time.

If more appointments are already scheduled for the day, each one will be processed in the same manner. This concludes building the "current load" schedule for the sorter.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 am | | | 1 pm | |
|--------------|------|---|----|----|------|-----|-----|-----|-------|----|----|----|-------|----|----|----|-------|----|----|------|----|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Staging Area | | | 40 | 80 | 95 | 110 | 125 | 140 | 115 | 90 | 65 | 40 | 15 | 0 | | | | | | | |
| App "001" | | | 40 | 40 | 40 | 40 | 40 | 40 | | | | | | | | | | | | | |
| Sorter Load | | | | | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 15 | | | | | | | |

Example 1


This example illustrates how the next incoming appointment request is handled.

- A new appointment, Appointment 002, is requested for 9:30 a.m. Appointment 002 is represented by the table cells highlighted in blue.
- The appointment duration is estimated at one hour.
- Appointment 002 delivers 120 X-Dock units.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 pm | | | | 1 pm |
|--------------|------|---|----|----|------|------------------|-----|-----|-------|----|----|----|-------|----|----|----|-------|----|----|----|------|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Staging Area | | | 40 | 80 | 95 | 110 | 125 | 140 | 115 | 90 | 65 | 40 | 15 | 0 | | | | | | | |
| App "001" | | | 40 | 40 | 40 | 40 | 40 | 40 | | | | | | | | | | | | | |
| App "002" | | | | | | 120 X-Dock units | | | | | | | | | | | | | | | |
| Sorter Load | | | | | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 15 | | | | | | | |

Appointment 002 arrives at 9:30, lasts for four intervals and releases 30 X-Dock units per interval. Consider Intervals #7 through #10. By the end of these four intervals, Appointment 002 will unload all 120 X-Dock units to the staging area.

During Intervals #7 through #10, the sorter is running at the maximum capacity processing X-Dock units accumulated from previous appointments. In each interval, the sorter will process 25 units reducing the staging area backlog. The earliest time the sorter could start processing units from Appointment 002 is Interval #14, where, after Appointment 001 is processed, a capacity of 10 units remains. Therefore, at Interval #14, the sorter will process the first 10 units brought in by Appointment 002. The sorter will continue processing units until Interval #19 where the last 10 units from the Appointment 002 will be sorted. Because the system was able to place all X-Dock units from the Appointment 002 into the sorter time buckets, Appointment 002 could be auto-approved, assuming it meets all other auto-scheduling criteria.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 pm | | | | 1 pm |
|--------------|------|---|----|----|------|-----|-----|-----|-------|-----|--|-----|-------|---------|----|----|-------|----|----|----|------|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Staging Area | | | 40 | 80 | 95 | 110 | 155 | 200 | 205 | 210 | 185 | 160 | 135 | 110 | 85 | 60 | 35 | 10 | 0 | | |
| App "001" | | | 40 | 40 | 40 | 40 | 40 | 40 | | | | | | | | | | | | | |
| App "002" | | | | | | | 30 | 30 | 30 | 30 |  | | | | | | | | | | |
| Sorter Load | | | | | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 15 + 10 | 25 | 25 | 25 | 25 | 10 | | |

Example 2

In this example, Appointment 002 has a requested time of 12:00 p.m. and an estimated appointment duration of 30 minutes.

Appointment 002 unloads its X-Dock units at a rate of 60 units per interval. Since the sorter is idle at 12:00 p.m., the X-Dock units of Appointment 002 can be processed immediately, at the rate of 25 units per interval. However, the sorter will not be able to process all 120 X-Dock units by the time it closes at 1:00 p.m.. In this case, Appointment 002 cannot be auto-approved for 12:00 p.m.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 pm | | | 1 pm | |
|--------------|------|---|----|----|------|-----|-----|-----|-------|----|----|----|-------|----|----|----|-------|----|----|------|----|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Staging Area | | | 40 | 80 | 95 | 110 | 125 | 140 | 115 | 90 | 65 | 40 | 15 | 0 | | | 35 | 70 | 45 | 20 | |
| App "001" | | | 40 | 40 | 40 | 40 | 40 | 40 | | | | | | | | | | | | | |
| App "002" | | | | | | | | | | | | | | | | | 60 | 60 | | | |
| Sorter Load | | | | | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 15 | 0 | 0 | 25 | 25 | 25 | 25 | 20 |

Example 3

In this example, Appointment 002 has a requested time of 12:00 p.m. as in the previous example but only 90 X-Dock units. Appointment 002 will be auto-approved successfully for a 12:00 p.m. to 12:30 p.m. time frame. With both Appointment 001 and Appointment 002 approved, the sorter is running at maximum capacity in each interval except for Intervals #15 and #16. Theoretically, the sorter has a remaining capacity of 50 units in these intervals.

Another appointment request is received:

- A new appointment, Appointment 003, is requested for 11:30 a.m. Appointment 003 is represented by the table cells highlighted in red.
- The appointment duration is estimated at one hour.
- Appointment 003 delivers 40 X-Dock units.

Even though Appointment 003 overlaps Appointment 002, theoretically Appointment 003 could still be successfully auto-scheduled as long as another door is available and capable of handling the Appointment 003. In this example, such a door exists and is serviced by the same sorter processing both Appointment 001 and Appointment 002. The system must check the sorter capacity to have Appointment 003 auto-approved successfully.

Appointment 003 is delivering 40 X-Dock units and the sorter has a capacity of 60 units remaining from the requested time of Appointment 003 until the closing time of the sorter – 25 in Interval #15, 25 in Interval #16 and 10 remaining in Interval #20.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 pm | | | | 1 pm |
|--------------|------|---|----|----|------|-----|-----|-----|-------|----|----|----|-------|----|-----------------|----|-------|----|----|----|------|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Staging Area | | | 40 | 80 | 95 | 110 | 125 | 140 | 115 | 90 | 65 | 40 | 15 | 0 | | | 25 | 40 | 15 | 0 | |
| App "001" | | | 40 | 40 | 40 | 40 | 40 | 40 | | | | | | | | | | | | | |
| App "002" | | | | | | | | | | | | | | | | | 50 | 40 | | | |
| App "003" | | | | | | | | | | | | | | | 40 X-Dock units | | | | | | |
| Sorter Load | | | | | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 15 | 0 | 0 | 25 | 25 | 25 | 15 | |

However, when the appointment's load is applied to each time bucket in the "current load" schedule for the sorter (represented by the table cells highlighted in green below), the system cannot auto-approved Appointment 003. While the sorter has enough total capacity remaining in the sorter, at an unload rate of 10 units per interval, the appointment cannot be unloaded quickly enough to provide the necessary number of X-Dock units to the sorter during Intervals #15 and #16.

| Time line | 8 am | | | | 9 am | | | | 10 am | | | | 11 am | | | | 12 pm | | | | 1 pm |
|--------------|------|---|----|----|------|-----|-----|-----|-------|----|----|----|-------|----|----|----|-------|----|----|----|------|
| Interval # | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Staging Area | | | 40 | 80 | 95 | 110 | 125 | 140 | 115 | 90 | 65 | 40 | 15 | 0 | | | 35 | 60 | 35 | 10 | |
| App "001" | | | 40 | 40 | 40 | 40 | 40 | 40 | | | | | | | | | | | | | |
| App "002" | | | | | | | | | | | | | | | | | 50 | 40 | | | |
| App "003" | | | | | | | | | | | | | | | 10 | 10 | 10 | 10 | | | |
| Sorter Load | | | | | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 15 | 10 | 10 | 25 | 25 | 25 | 15 | 10 |

Creating a Carrier

DC Admins should have the following information before they create a carrier:

- Name
- SCAC (an industry code that will be used to uniquely group carriers. Carriers should know their SCAC)
- Terminal information for each carrier location
 - Terminal name: the name of the local carrier facility that dispatches trailers to DCs.
 - Code (short name of the terminal, supplied by carrier or can be made up if necessary)
 - Address
 - Contact information – primary point of contact at the Carrier Terminal
- User names, emails and phone numbers
- Location email preferences

To create a carrier:

- 1 From the main menu, select **Dock Appointments > Setup > Carriers**. The **Carriers** page/tab displays.

| Carrier Name | SCAC | Has Users |
|--------------|-------|-----------|
| David | David | Yes |
| David | David | Yes |
| LANDS | LANDS | Yes |

- 2 Right-click and select **New Carrier** from the menu. The **New Carrier** page is displayed.

- 3 Under Carrier Details, enter the carrier name, the SCAC, any notes and then specify a color from the pop-up menu. This color will help users visually identify the carrier.
- 4 Select the **Auto-scheduling enabled** checkbox to activate auto-scheduling logic for the new carrier.
- 5 Select the **Can combine appointment advices** checkbox to allow the new carrier to combine Appointment Advices into a single appointment request.
- 6 Under Carrier Users, select a username. Select the appropriate **Send Email When** check boxes. These checkboxes are unselected by default.

Select the **CC on the appointment updates made by this party** to have a carbon copy of the email notification sent to specified user email addresses on the carrier/supplier side. For example, if a supplier user updates an appointment, normally the email notification would only be sent to the DC users involved. With this option selected, carrier/supplier users subscribed via the CC functionality would also receive an email notification reporting this update as well.

an appointment request is submitted: Carrier or supplier(s) receive an "Appointment Submitted" notification when an appointment request is submitted but not auto-approved (left in "Submitted" status). The party that makes the change does not receive this notification.

an appointment is re-submitted by carrier/supplier: Carrier or supplier(s) receive an "Appointment Re-submitted" notification when a supplier modifies and

resubmits a previously approved appointment for manual approval. The party that makes the change does not receive this notification.

an appointment request is updated by carrier/supplier user: A generic notification message sent out when the change to the appointment cannot be categorized as one of the more precise "subscription" events (e.g. "Re-scheduled", "Cancelled", "Submitted", etc.).

➔ **Note**— When only the appointment start time has been changed, the carrier and suppliers will receive an "Appointment Re-scheduled" notification when the an appointment is re-scheduled setting is enabled.

If the user is not listed, select **Not in List**. The **Create User** page is displayed. For more information on setting up a new user, see [Setting Up New Users for the Parties](#).

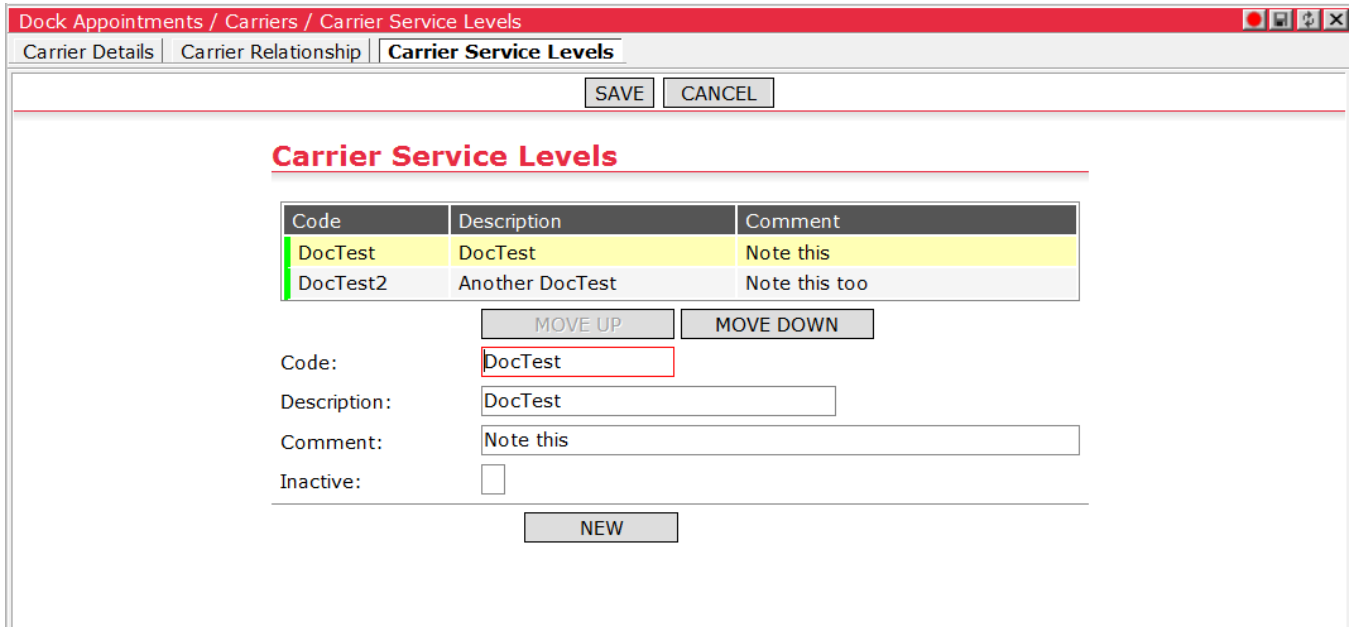
- 7 Click **New** to add additional carrier users.
- 8 Under Carrier Terminals, enter the terminal name, code, street address, city/state/zip, country, contact name, phone and fax.
- 9 Under Location Email Preferences, enter the location's email address. Select the appropriate **Send Email When** check boxes.
- 10 Click **New** to add additional carrier locations
- 11 Click **Save** to save the new carrier.

Service Level Specification Per Carrier

Users can specify service levels for each carrier in the system and add these items to an appointment from the **Service Level** dropdown on the appointment form. This menu is populated when a carrier with service levels specified is selected.

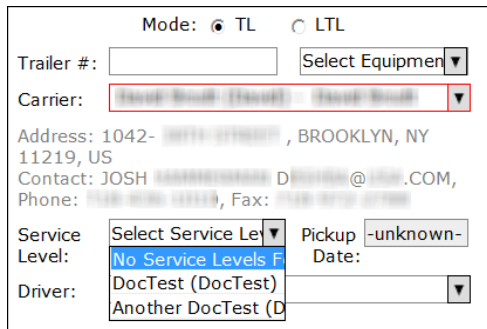
To add service levels to a carrier:

- 1 Select **Setup > Carriers**. Right-click on a carrier in the list and select **Carrier Service Levels** from the right-click menu.



- 2 Specify a Code, Description and Comment for the new service level.
- 3 Click **New** to add another to the list. Use the **Move Up** and **Move Down** buttons to order the entries by priority. Select the **Inactive** checkbox to mark the highlighted entry as inactive. Inactive entries appear with a red marker instead of green.

When creating or updating an appointment, the **Service Level** dropdown will populate with any service level entries associated with the selected carrier.

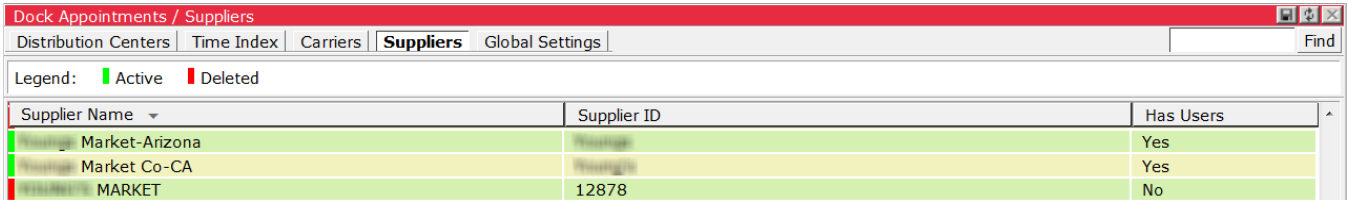


Creating a Supplier

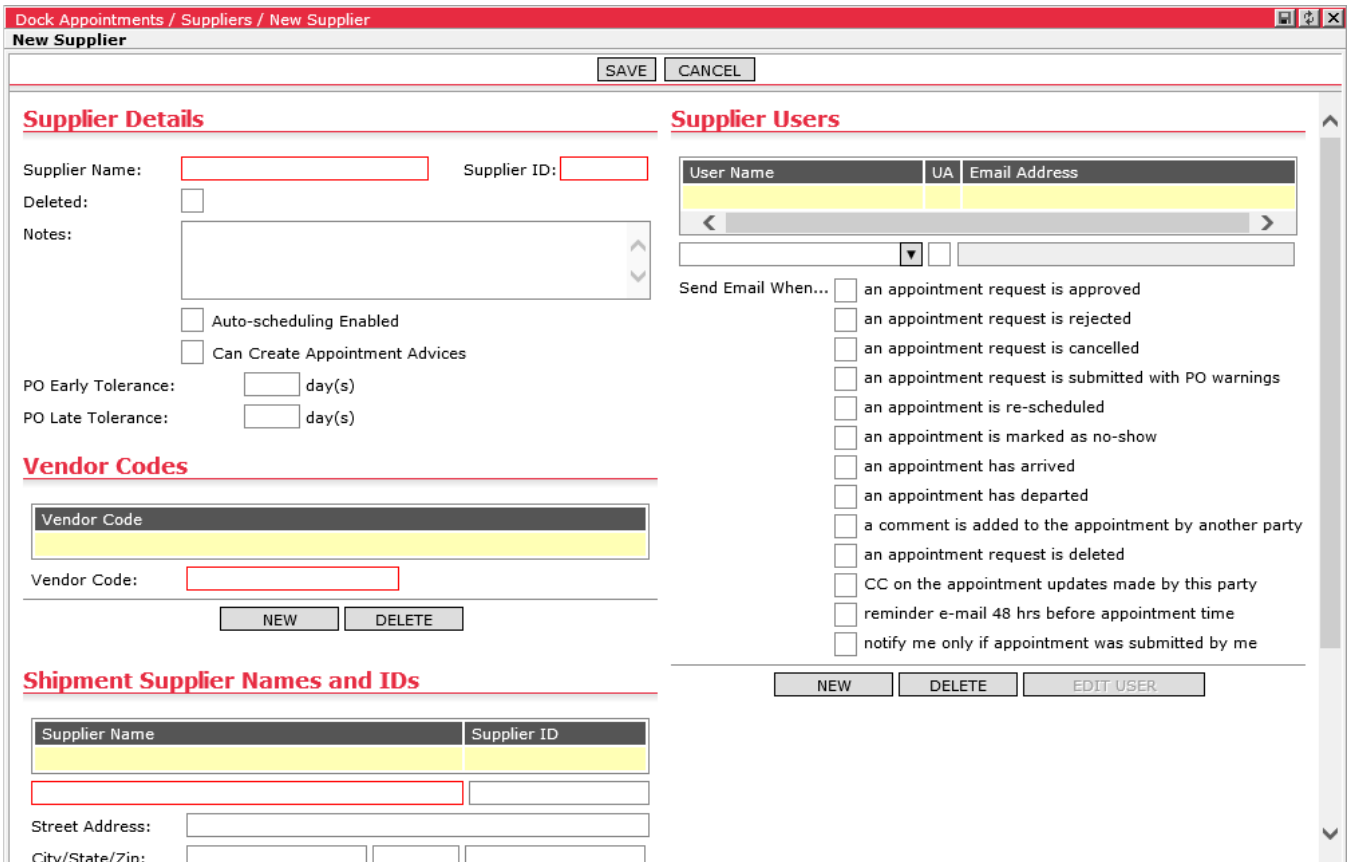
Use the following steps to create new suppliers.

To create a new supplier:

- 1 From the main menu, select **Dock Appointments > Setup > Supplier**. The **Suppliers** page/tab displays.



- 2 Right-click and select **New Supplier** from the menu. The **New Supplier** page is displayed.



- 3 Under Supplier Details, enter the supplier name, supplier ID and any notes.
 - ❗ **Tip—** Supplier ID should be an internal Accounting Code since it will be used to track exceptions later.
- 4 Select the **Auto-scheduling enabled** checkbox to activate auto-scheduling logic for the new supplier.

- 5 Select the **Can combine appointment advices** checkbox to allow the new supplier to combine Appointment Advices into a single appointment request.
- 6 Set the PO Early tolerance and PO Late Tolerance. The tolerance values per supplier override the DC values when calculating tolerance dates. For the system to use these values during PO validation in Template-M, implementation specialists must also configure SELECT1 and SELECT3 profile items SQL to handle supplier-level tolerances. Please see [Enable Supplier-Level Delivery Tolerance](#) in Appendix G for more information.
- 7 Under Shipment Supplier Names and IDs, enter the supplier name, supplier IDs and contact information included in the purchase orders belonging to the same supplier account. Click **New** to add additional Supplier Names and IDs. This will group these supplier IDs under a single supplier account. Often a single supplier will be referenced in purchase orders under different supplier names and IDs, for each of their business units or manufacturing locations. You can also use merge to identify other supplier IDs already created or imported from purchase order data in Descartes Visibility. For more information on the Merge functionality, see [Merging Suppliers](#).



Warning— Do not use the New to add additional supplier names.

- 8 Under Suppliers Users, enter the user name. Select the appropriate **Send Email When** check boxes.

Select the **CC on the appointment updates made by this party** to have a carbon copy of the email notification sent to specified user email addresses on the carrier/supplier side. For example, if a supplier user updates an appointment, normally the email notification would only be sent to the DC users involved. With this option selected, carrier/supplier users subscribed via the CC functionality would also receive an email notification reporting this update as well.

an appointment request is submitted: Carrier or supplier(s) receive an "Appointment Submitted" notification when an appointment request is submitted but not auto-approved (left in "Submitted" status). The party that makes the change does not receive this notification.

an appointment is re-submitted by carrier/supplier: Carrier or supplier(s) receive an "Appointment Re-submitted" notification when a supplier modifies and resubmits a previously approved appointment for manual approval. The party that makes the change does not receive this notification.

an appointment request is updated by carrier/supplier user: A generic notification message sent out when the change to the appointment cannot be categorized as one of the more precise "subscription" events (e.g. "Re-scheduled", "Cancelled", "Submitted", etc.).

➡ **Note**— When only the appointment start time has been changed, the carrier and suppliers will receive an "Appointment Re-scheduled" notification when the an appointment is re-scheduled setting is enabled.

If the user is not listed, select **Not in List**. The **Create User** page is displayed. For more information on setting up a new user, see *Setting Up New Users for the Parties*.

9 Click **New** to add additional supplier users.

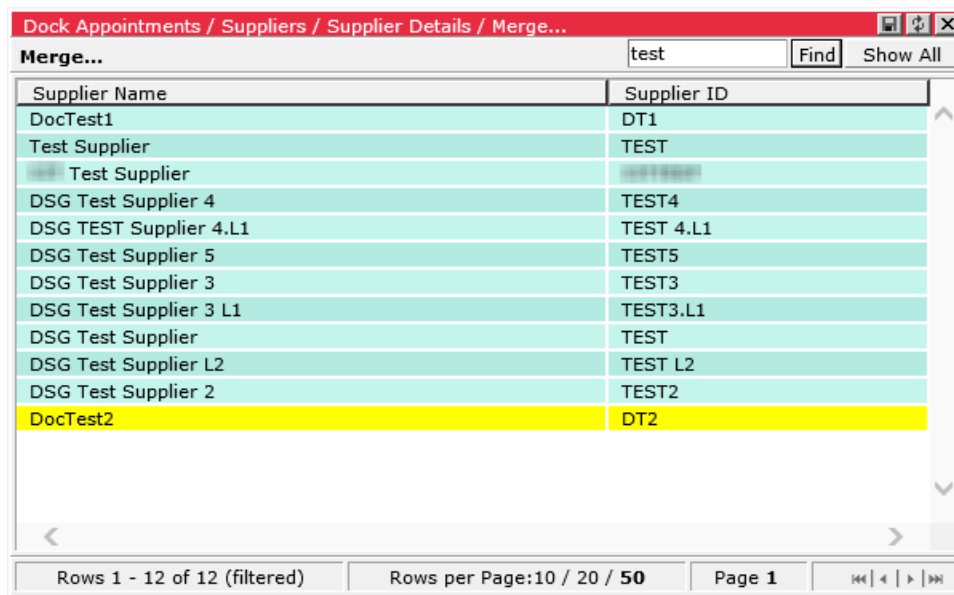
10 Click **Save** to save the new supplier.

Merging Suppliers

Users can merge suppliers in the system into one supplier from the **Supplier Details** page. With the merge functionality, the system combines the suppliers' users and party relationships into one record. Further details on this process are provided in the following steps.

To merge suppliers:

1 From the **Supplier Details** page, click the **Merge** button in the Shipment Supplier Names and IDs section. In this example, the supplier DocTest3 will be merged with DocTest2. The **Merge** window appears with a list of suppliers.



2 Right-click on the supplier to be merged (DocTest3) in the list and choose the **Select** option from the right-click menu. The selected supplier record is added to the Shipment Supplier Names and IDs table.

Shipment Supplier Names and IDs

| Supplier Name | Supplier ID |
|---------------|-------------|
| DocTest3 | DT3 |
| DocTest2 | DT2 |

DocTest2 x DT2

Street Address:

City/State/Zip:

Country: ▼

Contact:

Phone: Fax:

Location Notes:

NEW DELETE MERGE...

3 Click **Save**. The system does the following:

- Adds the selected shipment supplier names and IDs of DocTest3 to DocTest2
- Adds the supplier users from DocTest3 to DocTest2, which are immediately viewable from the **Supplier Details** page

Dock Appointments / Suppliers / Supplier Details

Supplier Details

SAVE DELETE RESECURE CLOSE

Supplier Details

Supplier Name: Supplier ID:

Deleted:

Notes:

Auto-scheduling Enabled

Can Create Appointment Advices

PO Early Tolerance: day(s)

PO Late Tolerance: day(s)

Vendor Codes

| Vendor Code |
|-------------|
| |

Vendor Code:

NEW DELETE

Shipment Supplier Names and IDs

| Supplier Name | Supplier ID |
|---------------|-------------|
| DocTest2 | DT2 |
| DocTest3 | DT3 |

DocTest2 x DT2

Street Address:

City/State/Zip:

Country: ▼

Contact:

Phone: Fax:

Location Notes:

NEW DELETE MERGE...

Supplier Users

| User Name | UA | Email Address |
|-----------------------|---------------------|---------------------|
| DSG Supplier | eeerrr075@gmail.com | eeerrr075@gmail.com |
| DSG Supplier2 | | @descartes.com |
| Test - Descartes Test | | @descartes.com |
| Test Supplier | | @descartes.com |

DSG Supplier ▼ eeerrr075@gmail.com

Send Email When...

an appointment request is approved

an appointment request is rejected

an appointment request is cancelled

an appointment request is submitted with PO warnings

an appointment is re-scheduled

an appointment is marked as no-show

an appointment has arrived

an appointment has departed

a comment is added to the appointment by another party

an appointment request is deleted

CC on the appointment updates made by this party

reminder e-mail 48 hrs before appointment time

notify me only if appointment was submitted by me

NEW DELETE EDIT USER

- Adds the party relationships from DocTest3 to DocTest2
- Removes DocTest3 from the Suppliers list page

When selecting a merged supplier from the dropdown on the **Create Appointment Request** or **Appointment Details** pages, the supplier will appear in the following format: "Supplier Name (Supplier Shipment ID) - Supplier Shipment Name". Following the example provided in this section, the option will appear as "DocTest2 (DT2) - DocTest3" as shown below.

Setting In-Transit Time for Suppliers

Users can add specific in-transit time from a supplier to a DC using a particular carrier. Transit time is used to calculate pickup dates based on a supplier's Ship From location, DC's Ship To location, selected carrier, selected service level of the chosen carrier and the specified Delivery Date. The logic uses the value provided in the In Transit (days) field for the given combination of parameters to roll back the specified number of days, barring weekends (Sundays are not counted as in transit days).

Note— This feature is specific to certain customers. If it is not requested by the customer, this feature will not be found in the form and will not be usable without modification.

To specify in-transit time:

- 1 Right-click on a supplier and select **In Transit Time** from the right-click menu. The **In Transit Time** tab appears.

| Ship From Supplier Location | Ship To DC | Carrier | Service | In Transit |
|-----------------------------|---------------------------|---------------|-------------------|------------|
| Chemung- NY (Chemung- NY) | Chemung- NY (Chemung- NY) | David (David) | DocTest (DocTest) | 3 |

- 2 Select location from the **Ship From Supplier Location** menu and the distribution you wish to associate from the **Ship To DC** menu. The **Using Carrier** dropdown populates with available carriers based on the associated Carrier-Supplier-DC party relationship. Only carriers related to the current supplier and selected DC are displayed in the down-down menu.
- 3 Select a carrier from the **Using Carrier** menu and the **Service Level** dropdown populates with associated service level options.
- 4 Enter the number of business days it will take in transit from the specified supplier location to the specified DC using the selected carrier and service level.

- 5 Click **New** to create another in-transit time entry or **Delete** to remove an existing entry. When finished, click **Save**.

Setting Up New Users for the Parties

When a new Distribution Center, Supplier or Carrier is set up, the DC Admin assigns a user for the party (DC, supplier and carrier). If the user is not listed in the dropdown list under Coordinator Users (for DC), Supplier Users or Carrier Users, a new user must be set up.

Before setting up a new user, the DC Admin should know the following information:

- User Name
- Login Name (name they will use to login with)
- Password
- What Role
 - Coordinator
 - Check-In User
 - View Only
 - Carrier
 - Supplier

➡ **Note**— Users cannot have more than one role. If a user needs more than one role, consider creating multiple logins.

To set up a new user:

- 1 From any of the following pages, click the **New** button in the Users section and select the **Not in List...** option from the **User Name** dropdown.
 - **New Distribution Center**
 - **Distribution Center Details**
 - **New Carrier**
 - **Carrier Details**
 - **New Supplier**
 - **Supplier Details**

The **Create User** page appears.

The screenshot shows a web application window titled "Create User". At the top, there is a red navigation bar with the text "Dock Appointments / Distribution Centers / Create User". Below this, there are "SAVE" and "CANCEL" buttons. The form is split into two columns. The left column, titled "Dock Appointment User Information", contains three input fields: "User Name", "Title", and "E-Mail Address". The right column, titled "Login Credentials", contains six input fields: "Login Name", "Password", "Confirm Password", "E-Mail Address for Resetting Password", "Recovery Question" (with a dropdown arrow), and "Recovery Answer". A checkbox labeled "Change after login" is located between the "Confirm Password" and "E-Mail Address for Resetting Password" fields.

- 2 Enter a User Name. In the Title field, enter the user's title.
- 3 In the E-Mail Address field, enter the user's email address.
- 4 In the Login Name field, enter the login name.
- 5 In the Password field, enter the login password.
- 6 In the Confirm Password field, reenter the login password.
- 7 In the E-mail Address for Resetting Password field, enter the email address a user will need to provide when requesting a temporary password. For more information on this feature, please see [Appendix D: Resetting a User Password by Email](#).

➡ **Note**— The Recovery Question field and the Recovery Answer field are not used at this time. Please ask the users to contact the DC Admin if they need to reset your password. DC Admin can reset the user's password in the same screen.

ⓘ **Tip**— Before you select **Save**, make sure that you write down the login name and the password. After you select **Save**, you will not be able to see the password.

- 8 Select **Save**.

➡ **Note**— If you do not select **Save**, your information will be lost.

After you have created the new user, email or notify the user of the URL, login name and password.

Setting a Carrier or Supplier User as Party User Admin

DC Admin users can designate users assigned to a carrier or supplier as Party User Admins from the **Carrier Details** and **Supplier Details** pages. Party User Admins can add, edit or remove carrier or supplier users assigned to their party (the carrier

or supplier) respectively. For more information on what actions the Party User Admin can perform, please see *[Managing Users as a Party User Admin](#)*.

Please note the following regarding this feature:

- Carrier or supplier users with access to multiple parties could be designated as a Party User Admin for one carrier or supplier, but as a regular carrier or supplier user for another. For all other parties the Party User Admin has access to but is not a User Admin of, pages will appear as they would for a regular carrier or supplier user.
- Party User Admins cannot designate other users as Party User Admin or remove Party User Admin privileges from other users. Only DA Admin and DC Admin users can perform these actions.
- Party User Admins can only view existing users currently assigned to the party in the dropdown list. The **Not in list...** option displays the **Create User** page, allowing the Party User Admin to create new users for the party.

Designating Supplier/Carrier Users as Party User Admins

Only DC Admins can designate carrier or supplier users as Party User Admins. To designate a carrier or supplier user as a Party User Admin:

- 1** From the main menu, select **Dock Appointments > Setup > Carriers** or **Suppliers**. The **Carriers** or **Suppliers** list page appears.

- Double-click the carrier or supplier you wish to modify or right-click on the carrier or supplier and select **Carrier/Supplier Details** from the right-click menu. The **Carrier/Supplier Details** page appears.

- In the Carrier Users or Supplier Users section, select the user you wish to designate as a Party User Admin and click the checkbox under the UA column.

- Save the carrier or supplier. For more information on what actions the Party User Admin can perform, please see [Managing Users as a Party User Admin](#).

Configuring Global Settings

System-wide preferences can be set for all users from the **Global Settings** page. To specify global settings, from the main menu, select **Dock Appointments > Setup > Global Settings**. The **Global Settings** page displays.

The available settings depend on the template in use.

Template-C Global Settings

Global Settings

NO TEMPLATE SET Application Template (ReadOnly)

Auto Transition Off Automatic Transitions Off

Deleted Age (Enter Number Age in Days to Purge Appointments Marked as Deleted)

Checked-In Age (Enter Number Age in Days to Purge Appointments Marked as Checked-In)

99 Maximum PO limit per appointment

48 Number of Hours to Send a Reminder e-mail for Approved Appointments (leave blank for No Reminders)

Enable PartyRelationship logic

Display Quantities on Door Assignments

Enable Appointment Advices

Enable Carrier Self-Registration

Disable Manual Approval For Request with Invalid Line Items

In the Global Settings section, specify the following:

- Automatic transition preferences, by select a preference and then enter the number of hours past due that an approved appointment has to be before it is transition to a missed or no show/delivery failure status.
- Appointments that are marked as deleted and checked-in after a certain number of days, enter the number of days in the fields Deleted Age and Checked-In Age.
- The maximum number of POs permitted per appointment **Reminder emails:** specify the number of hours before an approved appointment to send a reminder email to carriers and/or suppliers. To disable this setting, leave the field blank. Once the global setting is enabled with a set number of hours, users can turn this functionality on and off per Carrier User, Carrier Terminal, Supplier User and Supplier Terminal from the **Carrier Details** and **Supplier Details** pages.

| User Name | Email Address |
|----------------|---------------------|
| DSG Carrier | @descartes.com_bkup |
| test carrier | @descartes.com_bkup |
| test carrier 2 | |

DSG Carrier

Send Email When... an appointment request is approved
 an appointment request is rejected
 an appointment request is cancelled
 an appointment request is submitted with PO warnings
 an appointment is re-scheduled
 an appointment is marked as no-show
 an appointment has arrived
 an appointment has departed
 a comment is added to the appointment by another party
 a appointment request is deleted
 CC on the appointment updates made by this party
 reminder e-mail 72 hrs before appointment time

NEW DELETE

Contact:
 Phone: Fax:

LOCATION EMAIL PREFERENCES

Email Address:

Send Email When... an appointment request is approved
 an appointment request is rejected
 an appointment request is cancelled
 an appointment request is submitted with PO warnings
 an appointment is re-scheduled
 an appointment is marked as no-show
 an appointment has arrived
 an appointment has departed
 a comment is added to the appointment by another party
 a appointment request is deleted
 CC on the appointment updates made by this party
 reminder e-mail 72 hrs before appointment time

NEW DELETE

When saved, the value specified on the **Global Settings** page automatically updates the value displayed in the checkbox description on the **Carrier Details** and **Supplier Details** pages. If this setting is disabled (blank value), the checkbox does not display on the **Carrier Details** and **Supplier Details** pages.

Records of these emails will appear in the Email Notification column on the **Appointment History** list page.

Carrier Self Registration: When the DA Global Admin enables the **Allow Carrier Self-Registration** option on the **Global Settings** page, the system checks if the 'DA Unregistered Carrier (Model)' user group and the 'DA Unregistered Carrier' user role exist and then performs the following actions where appropriate.

- The system will create the 'DA Unregistered Carrier (Model)' user group and 'DA Unregistered Carrier' role if they do not exist.
- The system will activate the 'DA Unregistered Carrier (Model)' user group if it already exists.

When the DA Global Admin disables the **Allow Carrier Self-Registration** option, the system will deactivate the 'DA Unregistered Carrier (Model)' user group.

For more information, please see the [Carrier Self-Registration Process](#) section.

Disable Manual Approval for Request with Invalid Line Items: Allows administrators to disable manual appointment approval for appointment requests that contain invalid purchase orders (POs). With this setting enabled, the following error message is returned when users attempt to approve an invalid PO from the

appointment lists or the **Appointment Details** page: "This Appointment Request cannot be approved because it contains invalid lines."

If the **Validate Appointment Date Against POs Delivery Date** global setting is enabled in conjunction with the **Disable Manual Approval for Request with Invalid Line Items** setting, then the system will also check if the PO delivery date is valid.

A client's security administrator can also control which PO validation codes and PO Delivery Date validation codes are acceptable for manual approval. The text-keys used for configuration are described in *Text-Keys Related to PO Validation Codes*.

| Auto Scheduling Global Settings | |
|-------------------------------------|--|
| Per Party | ▼ Auto Scheduling Option |
| <input type="checkbox"/> | Validate AutoSchedule Appointment Line PO/ASN |
| <input type="checkbox"/> | Validate Appointment Date Against POs Delivery Date |
| <input type="checkbox"/> | Auto-Approved Appointment Assumes Standing Shell Duration (when use standing shell option is selected) |
| <input checked="" type="checkbox"/> | Allow External Appointment Requests (API calls) |

In the Auto Scheduling Global Settings section, specify the following:

- Enable or disable Auto-scheduling according to specific parameters:
 - When set to **Always**, auto-scheduling is enabled for all carriers, suppliers and distribution centers.
 - When set to **Never**, auto-scheduling is disabled for all carriers, suppliers and distribution centers.
 - When set to **Per Party**, the auto-scheduling setting must be specified on individual carrier, supplier and distribution center setup page by selecting the associated checkbox.
- **Validate AutoSchedule Appointment Line PO/ASN:** When enabled, this setting prevents submitted appointments with overridden purchase order or ASN values from being autoscheduled.
- **Validate Appointment Date Against POs Delivery Date:** When enabled, this setting activates validation of the selected Requested Date value on the **Create Appointment Request** and **Appointment Details** pages against the delivery date requirements displayed in the PO Delivery Date fields of purchase orders added. Configurable color coding can be used to indicate error and warning conditions for this threshold.
- **Auto-Approved Appointment Assumes Standing Shell Duration:** When this setting is enabled, for auto-approved appointments with the **Use standing shell** option selected, the system will use the planned duration of the standing appointment shell instead of updating the appointment with the duration value calculated by auto-scheduling.

- **Allow External Appointment Requests (API calls):** Allows the system to accept appointment requests sent via API from other systems, such as Descartes Transportation Manager. When this setting is enabled, new fields will display on the **Appointment Details**, **Appointment History** and appointment list pages to denote an appointment that has been externally submitted or updated. Please see [Lookup Functionality](#)
- *The lookup functionality allows multiple candidate* appointments that match the header criteria to be shortlisted so that more refined appointment line level matching can identify a unique candidate appointment that needs to be updated.

This functionality looks up all appointments matching header-level business keys provided in the **DASExternalAppointment** element. Multiple appointments can be found with this new functionality.

Any matching appointment IDs are saved and used to narrow the search for the specified **DASExternalAppointmentLine** elements.

If an appointment line record specified on the XML is not found, the system treats it as a candidate to be added to the appointment.

- ➔ **Note**— All subsequent **DASExternalAppointmentLine** elements must be not found or belong to the same appointment. If different **DASExternalAppointmentLine** elements match different appointments, the API reports an error in the output status record for the current **DASExternalAppointment** element, ignores it and moves on to the next **DASExternalAppointment** element (if it is present in the input XML).

Using MonAppointmentLocation Table Fields to Specify Business Key Parts

You can use fields from the MonAppointmentLocation table to specify business key parts. To refer to fields from this table, use the following aliases:

- **dc:** for DC location record
- **c:** for carrier location record
- **s:** for supplier location record (header or line level)

Example:

```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommon" ExtDocControlID="1FD41C07-
BE53-4EC5-9F28-BC8CDF035329">
    <BusinessKeyPart Name="dc.FacilityCode" Value="INI1"/>
    <BusinessKeyPart Name="CreatedDT" ValueFrom="2010-01-
01" ValueTo="2020-12-31"/>
    <BusinessKeyPart Name="StatusCode" Value="300"/>
    <BusinessKeyPart Name="RoutingNumber" Value="YARD 6/5/12"
Optional="1"/>
    <BusinessKeyPart Name="TotalQty" ValueFrom="6" ValueTo="7">
```

```
Optional="2"/>  
<BusinessKeyPart Name="c.DirectionsLabel" Value="URL" Optional="3"/>
```

BusinessKeyPart Element Attributes

When the **Optional** attribute is specified, the API adds a "field is empty" condition when selecting records in addition to the matching value condition. The "field is empty" condition is broader than NULL fields and includes:

- NULL or empty character-type fields
- NULL or zero value numeric fields

When matching records are selected in the database, the API applies additional process for all **Optional BusinessKeyParts**:

- If a single record is found with a non-empty value matching the condition, the record is used
- If more than one record is found with a non-empty value matching the condition, the API fails
- If no records are found with non-empty values matching the condition, the API looks for records where the corresponding field is "empty"
- If a single record is found with an empty value in the corresponding field, the record is used
- If more than one record is found with an empty value in the corresponding field, the API fails
- If no records are found with empty values matching the condition, the line is considered as "New Line to be added" candidate.

When a single record is found after applying the **Optional BusinessKeyPart**, the process is then repeated for the remaining optional **BusinessKeyParts** in the order of their [Optional] attribute value to ensure that the record is valid for each. If so, the record is updated. If not, the **DASExternalAppointmentLine** element is then considered as a "New Line" added to the appointment.

If multiple **BusinessKeyPart** elements are marked as **Optional**, each must have a unique value. For example:

```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommonAddNew" ExtDocControlID="1FD4
1C07-BE53-4EC5-9F28-BC8CDF035329">
    <BusinessKeyPart Name="dc.FacilityCode" Value="INI1"/>
    <BusinessKeyPart Name="AppointmentDTBegin" ValueFrom="2020-07-01
00:00" ValueTo="2020-07-01 23:59"/>
    <BusinessKeyPart Name="StatusCode" Value="300"/>

    <DASExternalAppointmentLine ExtDocControlID="Line1">
<BusinessKeyPart Name="s.PartyCode" Value="SUP101"/>
    <BusinessKeyPart Name="PONumber" Value="20299205"/>
    <BusinessKeyPart Name="ProbillNumber" Value="BOL1234" Optional="1"/>
    <BusinessKeyPart Name="EventCode" Value="HALLOWEEN" Optional="2"/>
    <BusinessKeyPart Name="OOSFlag" Value="Y" Optional="3"/>
    <Field Name="NumCasesShipped" Value="100"/>
    <Field Name="APL_UDF8" Value="ABC"/>
  </DASExternalAppointmentLine>
</DASExternalAppointment>
</parmDASExternalAppointment>
```

Each business key marked in this way is processed in order of the Optional value (1, 2, 3, etc.).

When the **OrIsNull** attribute is present and set to "1" in the XML, the API attempts to find either records with a matching value/range or records where the field is NULL. This attribute can be used at the header or line level.

Example:

```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommon" ExtDocControlID="1FD41C07-
BE53-4EC5-9F28-BC8CDF035329">
    <BusinessKeyPart Name="dc.FacilityCode" Value="INI1"/>
    <BusinessKeyPart Name="CreatedDT" ValueFrom="2020-07-01
00:00" ValueTo="2020-07-01 23:59"/>
    <BusinessKeyPart Name="StatusCode" Value="300"/>
    <BusinessKeyPart Name="s.PartyCode" Value="SupplierCodeABC"
OrIsNull="1"/>
    <Field Name="OverrideTotalPallets" Value="20"/>
  </DASExternalAppointment>
</parmDASExternalAppointment>
```

With the **ValueFrom** and **ValueTo** attributes, you can specify a range of values to narrow the search for the appointment to update.

Example:

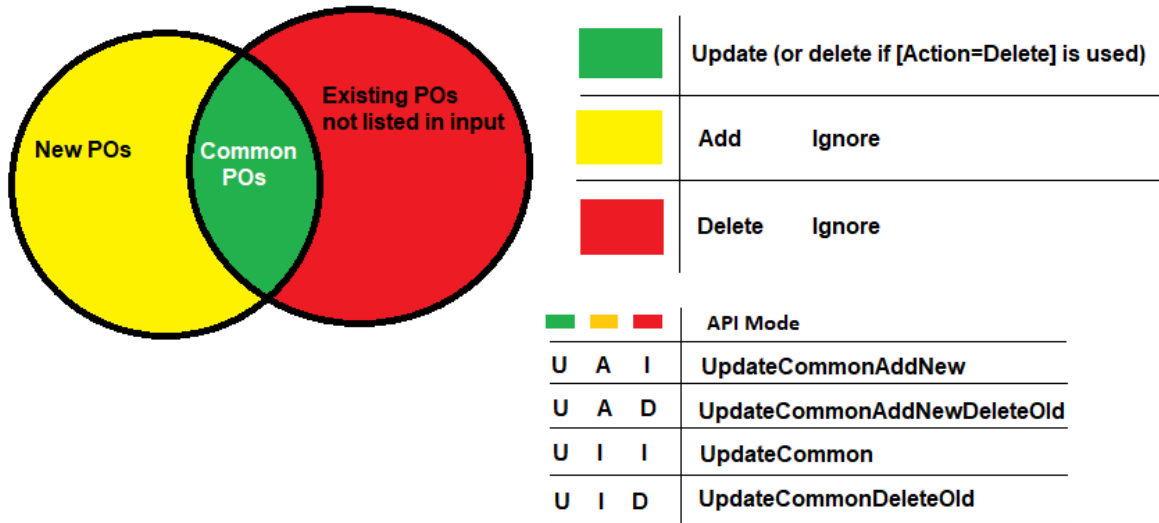
```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommon" >
    <BusinessKeyPart Name="dc.LocationCode" Value="DSGtestDC4"/>
    <BusinessKeyPart Name="RequestedDT" ValueFrom="2019-12-18T00:00:00" ValueTo="2019-12-18T23:59:59"/>
```

Update Modes Added

Four update modes can be specified as attributes of the **DASExternalAppointment** element.

```
<parmDASExternalAppointment>
  <DASExternalAppointment
    Mode="UpdateCommonAddNewDeleteOld"
    ExtDocControlID="1FD41C07-BE53-4EC5-9F28-BC8CDF035329" >
    <BusinessKeyPart Name="RequestNumber" Value="1803822"/>
    <Field Name="EquipmentID" Value="PAA.TRL-1"/>
    <DASExternalAppointmentLine>
      <BusinessKeyPart Name="PONumber" Value="P01"/>
      <Field Name="APL_UDF8" Value="Unilev 1"/>
      <Field Name="NumCasesShipped" Value="100"/>
    </DASExternalAppointmentLine>
```

These modes are described in the graphic and table below. Depending on the mode specified, the API processes new and existing POs differently and updates or deletes the PO lines that already exist in the system and are specified in the input XML ("common" PO lines).



| Mode | Common Lines | New Lines | Existing Lines Not Found in Input |
|------------------------------------|--|--------------------------|-----------------------------------|
| UpdateCommon (default) | Updated (Deleted if Action=Delete specified) | Not added | Left unchanged |
| UpdateCommonAddNewDeleteOld | Updated (Deleted if Action=Delete specified) | Added to the appointment | Deleted from the appointment |
| UpdateCommonAddNew | Updated (Deleted if Action=Delete specified) | Added | Left unchanged |
| UpdateCommonDeleteOld | Updated (Deleted if Action=Delete specified) | Not added | Deleted from the appointment |

ExtDocControlID Now Supported at Line Level

The ExtDocControlID can now be specified at the line level of the input XML to assist with testing and diagnostics. Previously, if an issue occurred at the line level, support had difficulty telling which line element was the problem.

- Identifying Externally Submitted Appointments in the User Interface for more information.

Appointment Detail Form Settings

- Do Not Prepopulate Carrier
- Prepopulate Supplier
- Do Not Prepopulate Ship To (Distribution Center)
- Do Not Validate PO Numbers
- Header Level Supplier Is Required
- Make PO Number Field Optional
- Copy Header Level Supplier To Line Item
- Use Combo Box for Routing #
- Enable Preferred Carrier Feature EDIT PREFERRED CARRIER LIST

In the Appointment Detail Form Settings section, specify the following:

- **Do Not Prepopulate Carrier:** Select this option to disable the prepopulation of the Carrier field based on the previous appointment created
- **Prepopulate Supplier:** Select this option to enable the prepopulation of the Supplier field based on the previous appointment created
- **Do Not Prepopulate Ship To (Distribution Center):** Select this option to disable the prepopulation of the Ship To field based on the previous appointment created
- **Do Not Validate PO Numbers:** Disables PO validation. This option changes the distribution of fields on the **Appointment Details** page as shown below. Purchase order details are no longer automatically populated and must be entered manually.

| PO # | Pro # | Supplier Name | Comments | Cases | Pallets | Type |
|--|-------|---------------|----------|-------|---------|------|
| <div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> PO #: <input style="width: 150px;" type="text"/> Pro #: <input style="width: 100px;" type="text"/> <input type="radio"/> FLR <input type="radio"/> PLT </div> <div style="margin-top: 5px;"> Supplier Name: <input style="width: 150px; border: 2px solid red;" type="text"/> </div> <div style="margin-top: 5px;"> Quantity: <div style="display: flex; gap: 10px;"> <input style="width: 60px; border: 2px solid red;" type="text"/> <input style="width: 60px;" type="text"/> </div> <div style="display: flex; justify-content: space-around; font-size: small;"> Cases Pallets </div> </div> <div style="margin-top: 5px;"> Comments: <input style="width: 350px;" type="text"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> NEW DELETE </div> </div> | | | | | | |

- **Header Level Supplier Is Required:** Changes the Supplier field at the header level on the **Appointment Details** page into a required field.
- **Make PO Number Field Optional:** Removes the requirement to enter a PO number from the **Appointment Details** page.

- **Copy Header Level Supplier To Line Item:** With this setting enabled, the Supplier entered at the header level of the appointment is automatically populated at the line item (PO) level.
- **Use Combo Box for Routing:** For certain clients, changes the Routing # field to the **Product Type** dropdown (combobox) on the **Appointment Details** page, allowing users to enter and retain Product Type data for later selection. The field has character limit of 50. Selecting the empty value will reset previously entered key strokes.

The **Product Type** menu is populated based on the top 'N' most frequently used entries for appointments in the system, 'N' being the value entered in the Maximum Number of Entries field on the **Global Settings** page. These values are listed in alphabetical order.

- **Enable Preferred Carrier Feature:** Allows users to specify values in a list window to be selected from a dropdown on the **Create Appointment/Appointment Details** pages. This feature is fully customizable: the setting name, field name, values and other associated messages can be set up per client. In the following example, this feature is customized to allow users to add Preferred Carriers to an appointment.

Appointment Detail Form Settings

Do Not Prepopulate Carrier

Prepopulate Supplier

Do Not Prepopulate Ship To (Distribution Center)

Do Not Validate PO Numbers

Header Level Supplier Is Required

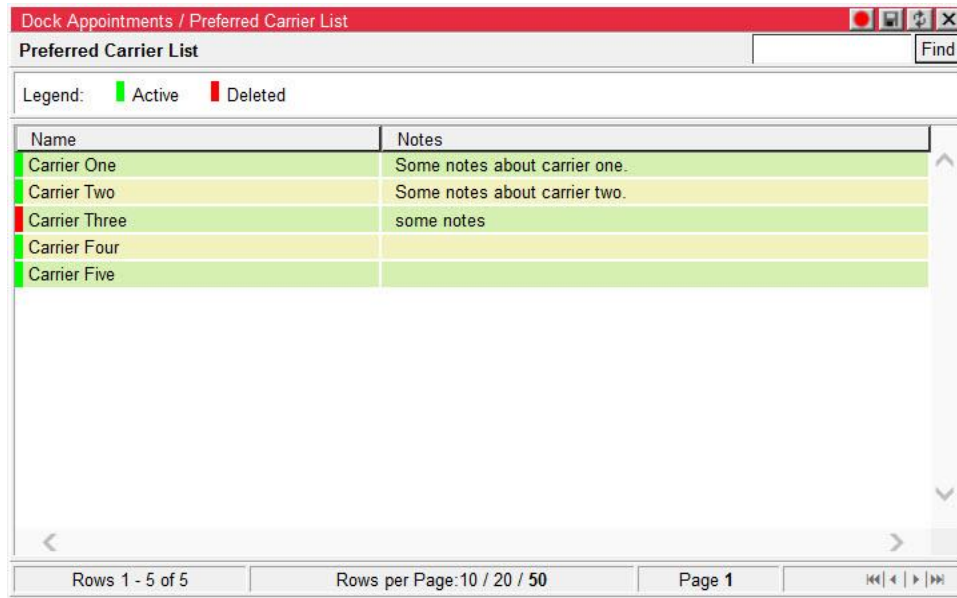
Make PO Number Field Optional

Copy Header Level Supplier To Line Item

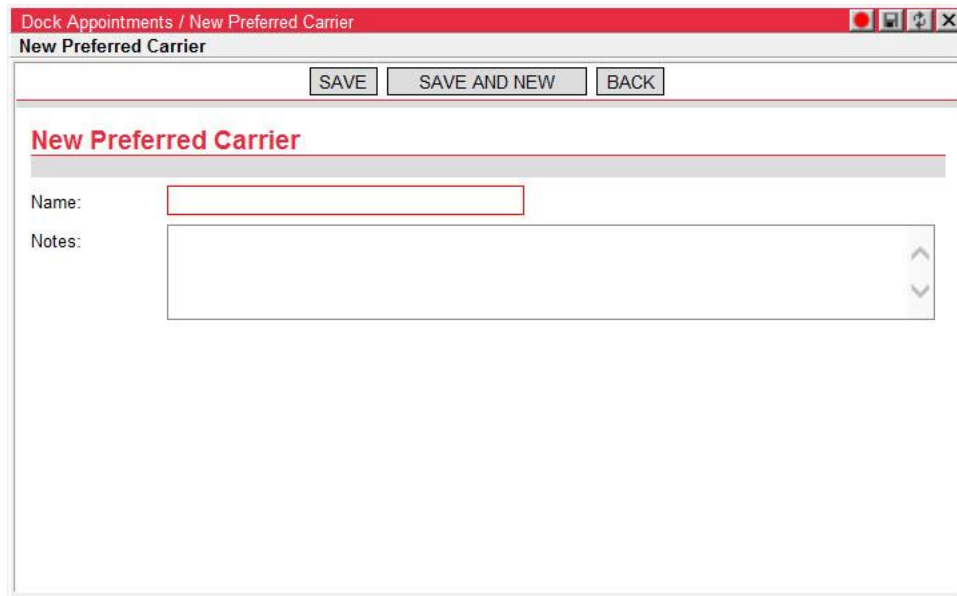
Use Combo Box for Routing #

Enable Preferred Carrier Feature

When the **Enable Preferred Carrier Feature** is selected, the **Edit Preferred Carrier List** button appears on the **Global Settings** page. Click the button to display the **Preferred Carrier List** window.



From this window, users can create new carriers, edit existing carriers or mark carriers in the list as deleted. To add a new carrier, right-click in the window and select **Add New** from the right-click menu. The **New Preferred Carrier** window appears.



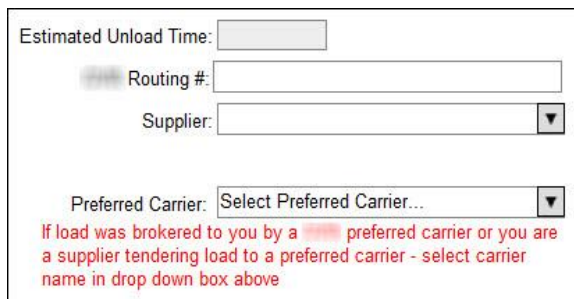
Specify a name and any notes and click **Save** to save and refresh the window or **Save and New** to save and display a blank window to create further carriers. Click **Back** to return to the list.

To edit an entry in the **Preferred Carrier List** window, right-click on a carrier and select the **Details** option.



When an entry is deleted in the **Preferred Carrier List** window, the Name column is marked in red.

The **Enable Preferred Carrier Feature** setting also adds a dropdown to the **Create Appointment** and **Appointment Details** pages.



This menu is populated with entries from the **Preferred Carrier List** window. Deleted entries will not appear in the dropdown. The system can be set to display a message under the menu as displayed above. The text and color of the message are customizable.

Hot Appointment Settings

Validate Against All Line Items STA Date and Appointr Appointment Date Validation For 'Hot' Appointment

Allow Carrier or Supplier User To Mark Appointment As 'Hot' At The Header Level

Allow Carrier or Supplier User To Mark Appointment PO Lines As 'Hot'

Allow Multiple Hot POs Assignment (popup form)

In the Hot Appointment Settings section, specify the following:

- **Appointment Date Validation for "Hot" Appointment:** Users have three options for appointment date validation.
 - **Do Not Validate:** Disables validation.
 - **Validate Against Hot Line Items STA Date Only:** If an appointment contains line items marked as "Hot", the approval date must be before or equal to each "Hot" purchase order STA date. Otherwise, DC users approving or rescheduling the appointment will receive a warning notification.
 - **Validate Against Hot Line Items STA Date and Appointment Requested:** If an appointment is marked as "Hot" at the header level and contains line items marked as "Hot", the approval date must be before or equal to each "Hot" purchase order STA date and the appointment requested date. Otherwise, DC users approving or rescheduling the appointment will receive a warning notification.
- **Allow Carrier or Supplier User to Mark Appointment as "Hot" at the Header Level:** When enabled, the **Track as hot appointment** checkbox is editable on the **Appointment Details** page header for carrier and supplier users. When disabled, the checkbox is read-only.
- **Allow Carrier or Supplier User to Mark Appointment PO Lines as "Hot":** When enabled, the **Hot Item** checkbox is editable in the line items section of the **Appointment Details** page for carrier and supplier users. When disabled, the checkbox is read-only.
- **Allow Multiple Hot POs Assignment:** When enabled, the **Assign Hot POs** button is displayed for DA Admin users on the **Summary** pane of the Dashboard. When disabled, this button is hidden.

Standing Appointment Settings

- Auto-Generate Standing Shells
- Maximum Number of Days Out to Generate Standing Shells (No more than 365, Default: 120)
- +- Hours from Appointment Requested Date to Select Merge Candidates
- Enable Instant Approval of Standing Shells

In the Standing Appointment Settings section, specify the following:

- **Auto-Generate Standing Shells:** When this setting is enabled, the system will automatically generate standing appointment shells for standing appointments in the system. When the **Auto-Generate Standing Shells** global setting is used in combination with the settings allowing the scheduling of standing appointments for a set number of days in the future, users do not have to remember to update a standing appointment's Ending Date when an extension is needed.
- Number of days out that standing appointment instances are generated
- Number of hours from the appointment requested date to select merge candidates
- Enable/disable automatic approval of standing shells

Miscellaneous Settings

- Comment is required to mark appointment as 'Delivery Failure'
- Comment is required to cancel the appointment
- Send appointment e-mail notifications to line level suppliers

Note to include with appointment e-mail notification (max 512 characters):

Front Store delivery appointments-- Lumpers must be hired. Drivers are not allowed on dock. Lumpers are on site and available to hire.-----
-----Pharmacy department deliveries--Drivers are required to enter the DC and sort out their product--All Pharmacy appointments are live- Drops are not allowed for pharmacy product.

In the Miscellaneous Settings section, specify the following:

- **Comment is required to mark appointment as 'Delivery Failure':** When enabled, makes the Comment field required on the **Delivery Failure** window.
- **Comment is required to cancel the appointment:** When enabled, makes the Comment field required on the **Cancel** window.
- **Note to include with appointment e-mail notification:** Allows Global Admin users to enter custom text that will be included in predefined fields on appointment email notifications and print outs. This field has a limit of 512 characters.

Appointment Extraction Settings

Do Appointment Extraction At Check-in

GLN Sender ID: GLN Receiver ID: GLN Action:

Address:

User Name: Reset Password: Password: Confirm Password:

When the **Appointment Extraction At Check-in** setting is checked, several new fields appear, allowing implementation specialists to configure Dock Appointments Scheduling to send the most current appointment information in real time to a client's WMS when an appointment is checked in.

The required Dataflow configuration is performed automatically by Dock Appointments Scheduling using these field values. The new fields are:

- **GLN Sender ID, Receiver ID, GLN Action**
- **Address:** The GLN URL
- **User Name:** A valid GLN user name
- **Reset Password:** Click **Reset Password** to enter or change the current GLN password for the user. Please note that this setting *cannot* be used to change a user's password in GLN. It only allows the password value used by Dataflow (the intermediary system) to be changed.

When this setting is disabled, no appointment extraction will be performed, but all values enter in these fields is retained and will appear when checked again.

Yard Management Settings

Yard Management Enabled (ReadOnly)

Initial number of entries in the carriers list on the "Arrive Trailer" dialog (Default = ALL)

Carrier List works in "Show All" mode

Initial number of entries in the drivers list on the "Arrive Trailer" dialog (Default = ALL)

Driver list works in 'Show All' mode

In the Yard Management Settings section, specify the following (the **Yard Management Enabled** checkbox is read only; the following options are only for clients using Yard Management):

- The initial number of carriers/drivers listed in the associated dropdown on the **Arrive Trailer** window
- Whether or not the **Carrier** and **Driver** dropdowns display the **...show all...** and **...show more...** options

Default Inbox Preferences

| CARRIER | SUPPLIER | COORDINATOR | CHECKIN |
|---|---|---|--|
| <input type="text" value=""/> Max Appointment Age (days) <input type="text" value="No Limit"/> (Draft) <input type="text" value="1"/> ted <input type="text" value="2"/> d/Cancelled <input type="text" value="3"/> led by Carrier/Supplier <input type="text" value="4"/> ved <input type="text" value="5"/> d <input type="text" value="6"/> e <input type="text" value="7"/> e <input type="text" value="8"/> e <input type="checkbox"/> Departed <input checked="" type="checkbox"/> Delivery Failure <input type="checkbox"/> Standing <input type="checkbox"/> Hide Acknowledged Cancellations | <input type="text" value=""/> Max Appointment Age (days) <input checked="" type="checkbox"/> Created (Draft) <input checked="" type="checkbox"/> Submitted <input checked="" type="checkbox"/> Refused/Cancelled <input type="checkbox"/> Cancelled by Carrier/Supplier <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Arrived <input type="checkbox"/> Departed <input checked="" type="checkbox"/> Delivery Failure <input type="checkbox"/> Standing | <input type="text" value=""/> Max Appointment Age (days) <input type="checkbox"/> Created (Draft) <input checked="" type="checkbox"/> Submitted <input type="checkbox"/> Refused/Cancelled <input type="checkbox"/> Cancelled by Carrier/Supplier <input type="checkbox"/> Approved <input type="checkbox"/> Arrived <input type="checkbox"/> Departed <input type="checkbox"/> Delivery Failure <input type="checkbox"/> Standing | <input type="text" value=""/> Max Appointment Age (days) <input type="checkbox"/> Created (Draft) <input type="checkbox"/> Submitted <input type="checkbox"/> Refused/Cancelled <input type="checkbox"/> Cancelled by Carrier/Supplier <input type="checkbox"/> Approved <input type="checkbox"/> Arrived <input type="checkbox"/> Departed <input type="checkbox"/> Delivery Failure <input type="checkbox"/> Standing |

In the Default Inbox Preferences section, check or uncheck the boxes next to the type of appointments you want users in the system to see in his or her inbox. These settings apply until a logged-in user modifies their inbox settings from the **Inbox Preferences** window. Basically, users are divided into two groups:

- Users who set their own preferences are not affected by changes made to the Default Inbox Preferences for their user type.
- Users who have not set their own preferences, including newly created users, rely on the Default Inbox Preferences for their user type and are immediately affected by any changes made to these preferences.

Note— When the **Inbox Preferences** window is displayed, users see the actual configuration used to select appointments for the user's **Dashboard**, regardless of whether the configuration is a default or a custom configuration. When you click **Save** on the **Inbox Preferences** window, a custom copy is created even if no modifications are made to the settings, which means that the default inbox preferences no longer apply. Click the **Reset** button to revert your inbox preferences to the default.

The Dashboard hides appointments older than the number of days (up to 30 days) selected from the **Max Appointment Age (days)** dropdown for the associated user type. Select **No Limit** from the dropdown if you do not want to impose an age limit on appointments displayed on the Dashboard for a user type.

Click **Save** when finished.

Template-M Global Settings

In the Global Settings section, specify the following:

- Appointments that are marked as deleted and checked-in after a certain number of days, enter the number of days in the fields Deleted Age and Checked-In Age.
- The maximum number of POs permitted per appointment
- **Reminder email setting:** specify the number of hours before an approved appointment to send a reminder email to carriers and/or suppliers. To disable this setting, leave the field blank.

Once the global setting is enabled with a set number of hours, users can turn this functionality on and off per Carrier User, Carrier Terminal, Supplier User and Supplier Terminal from the **Carrier Details** and **Supplier Details** pages.

| User Name | Email Address |
|----------------|---------------------|
| DSG Carrier | @descartes.com_bkup |
| test carrier | @descartes.com_bkup |
| test carrier 2 | |

DSG Carrier

Send Email When... an appointment request is approved
 an appointment request is rejected
 an appointment request is cancelled
 an appointment request is submitted with PO warnings
 an appointment is re-scheduled
 an appointment is marked as no-show
 an appointment has arrived
 an appointment has departed
 a comment is added to the appointment by another party
 a appointment request is deleted
 CC on the appointment updates made by this party
 reminder e-mail 72 hrs before appointment time

Contact:
 Phone:
 Fax:

LOCATION EMAIL PREFERENCES

Email Address:

Send Email When... an appointment request is approved
 an appointment request is rejected
 an appointment request is cancelled
 an appointment request is submitted with PO warnings
 an appointment is re-scheduled
 an appointment is marked as no-show
 an appointment has arrived
 an appointment has departed
 a comment is added to the appointment by another party
 a appointment request is deleted
 CC on the appointment updates made by this party
 reminder e-mail 72 hrs before appointment time

When saved, the value specified on the **Global Settings** page automatically updates the value displayed in the checkbox description on the **Carrier Details** and **Supplier Details** pages. If this setting is disabled (blank value), the checkbox does not display on the **Carrier Details** and **Supplier Details** pages.

Records of these emails will appear in the Email Notification column on the **Appointment History** list page.

Carrier Self Registration: When the DA Global Admin enables the **Allow Carrier Self-Registration** option on the **Global Settings** page, the system checks if the 'DA Unregistered Carrier (Model)' user group and the 'DA Unregistered Carrier' user role exist and then performs the following actions where appropriate.

- The system will create the 'DA Unregistered Carrier (Model)' user group and 'DA Unregistered Carrier' role if they do not exist.
- The system will activate the 'DA Unregistered Carrier (Model)' user group if it already exists.

When the DA Global Admin disables the **Allow Carrier Self-Registration** option, the system will deactivate the 'DA Unregistered Carrier (Model)' user group.

For more information, please see the *Carrier Self-Registration Process* section.

Disable Manual Approval for Request with Invalid Line Items: Allows administrators to disable manual appointment approval for appointment requests that contain invalid purchase orders (POs). With this setting enabled, the following error message is returned when users attempt to approve an invalid PO from the

appointment lists or the **Appointment Details** page: "This Appointment Request cannot be approved because it contains invalid lines."

If the **Validate Appointment Date Against POs Delivery Date** global setting is enabled in conjunction with the **Disable Manual Approval for Request with Invalid Line Items** setting, then the system will also check if the PO delivery date is valid.

A client's security administrator can also control which PO validation codes and PO Delivery Date validation codes are acceptable for manual approval. The text-keys used for configuration are described in *Text-Keys Related to PO Validation Codes*.

| Auto Scheduling Global Settings | |
|-------------------------------------|--|
| Always | ▼ Auto Scheduling Option |
| <input checked="" type="checkbox"/> | Validate AutoSchedule Appointment Line PO/ASN |
| <input type="checkbox"/> | Validate Appointment Date Against POs Delivery Date |
| <input type="checkbox"/> | Auto-Approved Appointment Assumes Standing Shell Duration (when use standing shell option is selected) |
| <input type="checkbox"/> | Enable AutoSchedule When Appointment Header/Line Totals are Overriden |

In the Auto Scheduling Global Settings section, specify the following:

- Enable or disable Auto-scheduling according to specific parameters:
 - When set to **Always**, auto-scheduling is enabled for all carriers, suppliers and distribution centers.
 - When set to **Never**, auto-scheduling is disabled for all carriers, suppliers and distribution centers.
 - When set to **Per Party**, the auto-scheduling setting must be specified on individual carrier, supplier and distribution center setup page by selecting the associated checkbox.
- **Validate AutoSchedule Appointment Line PO/ASN:** When enabled, this setting prevents submitted appointments with overridden purchase order or ASN values from being autoscheduled.
- **Validate Appointment Date Against POs Delivery Date:** When enabled, this setting activates validation of the selected Requested Date value on the **Create Appointment Request** and **Appointment Details** pages against the delivery date requirements displayed in the PO Delivery Date fields of purchase orders added. Configurable color coding can be used to indicate error and warning conditions for this threshold.
- **Auto-Approved Appointment Assumes Standing Shell Duration:** When this setting is enabled, for auto-approved appointments with the **Use standing shell** option selected, the system will use the planned duration of the standing appointment shell instead of updating the appointment with the duration value calculated by auto-scheduling.

- Enable AutoSchedule When Appointment Header/Line Totals are Overridden:** This option is dependent on the Appointment Detail Form Setting **Allow Override Line Level Quantities** and cannot be applied without selecting the latter option. The synergy of these options is described below.
 - Note—** This setting replaces the **Validate AutoSchedule Appointment Header/Line Totals** setting. Previously, the **Validate AutoSchedule Appointment Header/Line Totals** option was enabled to prevent submitted appointments with overridden packaging header values from being autoscheduled. The **Enable AutoSchedule When Appointment Header/Line Totals are Overridden** setting is deselected to activate the same functionality.

Appointment Detail Form Settings

Do Not Prepopulate Carrier

Prepopulate Supplier

Do Not Prepopulate Ship To (Distribution Center)

Allow Override Line Level Quantities

Disable Multiple PO Entry

Disable Manual PO Entry

Disable PO selection by ASN/Probill (Hide ASN related fields)

Allow Appointment Requests With No Line Items (header info only)

Auto Update Invalid Appointment Line Items (before saving)

Number of Appointment Line Items visible in the list (approx.)

In the Appointment Detail Form Settings section, specify the following:

- Do Not Prepopulate Carrier:** Select this option to disable the prepopulation of the Carrier field based on the previous appointment created
- Prepopulate Supplier:** Select this option to enable the prepopulation of the Supplier field based on the previous appointment created
- Do Not Prepopulate Ship To (Distribution Center):** Select this option to disable the prepopulation of the Ship To field based on the previous appointment created
- Allow Override Line Level Quantities:** When enabled, this setting allows users to specify ordered versus delivered quantities at the line level and manually enter packaging totals (cartons, pallets, bulky, etc.) on the header. When selecting this option, the **Enable AutoSchedule When Appointment Header/Line Totals are Overridden** autoscheduling option is automatically selected as well, to ensure that the autoscheduling process is properly triggered when these values are entered.

Additionally, the **Create Appointment Request** and the **Appointment Details** pages are modified when this option is selected. The automatically populated read-only fields for packaging are removed and, in the Units field in the PO Entry section, the Qty field becomes editable.

| | |
|----------|--------------------------------|
| Cartons: | <input type="text" value="5"/> |
| Pallets: | <input type="text"/> |
| GOH: | <input type="text"/> |
| Bulky: | <input type="text"/> |

| | | | |
|--------|----------------------------------|----------------------------------|------------------------------------|
| Units: | <input type="text" value="400"/> | <input type="text" value="207"/> | <input type="text" value="10000"/> |
| | Ordered | Delivered | Qty |

- **Disable Multiple PO Entry:** When enabled, this setting hides the **Multiple PO Entry** button on the **Create Appointment Request** and the **Appointment Details** pages.
- **Disable Manual PO Entry:** When enabled, this setting disables manual input and editing of line items on the **Create Appointment Request** and the **Appointment Details** pages.
 - Appointment line fields are not editable after entering and validating PO numbers on the **Multiple PO Entry** page.
 - When the **Allow Override Line Level Quantities** global setting is enabled (i.e., "Depletion Mode"), all appointment line fields except for the Quantity to Deliver field are no longer editable after entering and validating PO numbers on the **Multiple PO Entry** page.
- **Disable PO Selection by ASN/Probill#:** When enabled, this setting removes the **ASN#** dropdown from the **Create Appointment Request** and the **Appointment Details** pages.
 - ➔ **Note—** For Template-M, implementation specialists can have the system return the BOLNumber value as a non-empty string in the SELECT1 profile item when the **Disable PO selection by ASN/Probill** global setting is enabled. This feature is intended to ease the application configuration process when global settings are not entirely in sync with the profile items.
- **Allow Appointment Requests With No Line Items:** When enabled, this setting allows users to submit appointment requests with no line items.
 - ➔ **Note—** Auto-approval for appointments with no line items is always disabled. Such appointments are always processed via manual approval.
- **Auto Update Invalid Appointment Line Items:** When this setting is enabled, the backend appointment saving logic performs an additional check before data entered in the **Create Appointment Request** or the **Appointment Details** pages are saved. For each appointment line with no validation code set, this process validates purchase order numbers or ASNs against data in mapped third

party databases (such as in Descartes Visibility and Event Management). The list of valid purchase orders is retrieved and then an attempt is made to find each purchase order specified in the line item section of the **Create Appointment Request** or the **Appointment Details** pages. The process controlled by this setting also initializes missing validation codes for line items.

- Number of Appointment Line Items visible in the list:** The **Create Appointment Request**, **Appointment Details** and **Multi PO Entry** pages can be configured to display a certain number of PO rows in the PO table without having to scroll through a list. The number of PO rows that are displayed is approximate, e.g. if set to "10", users may see nine or 11 lines.

For example, when an appointment request has 10 POs assigned and the **Number of Appointment Line Items...** setting is set to "5", approximately five POs are visible in the table as shown below. Users must scroll down to view the other POs.

| ! | Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Loose Cartons | GOH | Bulky | Order Type | Class Group | EQ Order Type | Ad Da |
|---|-----|-----------------|------------------|------------|-----------------|----------|---------------|-----|-------|------------|-------------|---------------|-------------|
| * | | TEST_PO_3013696 | TEST_BOL_3013696 | TEST1 | TEST SUPPLIER 1 | | 0 | 0 | 150 | BOL_UDF8 | 1 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013689 | TEST_BOL_3013689 | TEST1 | TEST SUPPLIER 1 | | 6 | 0 | 2 | BOL_UDF8 | 0 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013690 | TEST_BOL_3013690 | TEST1 | TEST SUPPLIER 1 | | 7 | 1 | 5 | BOL_UDF8 | 1 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013691 | TEST_BOL_3013691 | TEST1 | TEST SUPPLIER 1 | | 100 | 0 | 0 | BOL_UDF8 | 0 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013692 | TEST_BOL_3013692 | TEST1 | TEST SUPPLIER 1 | | 0 | 125 | 0 | BOL_UDF8 | 1 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013694 | TEST_BOL_3013694 | TEST1 | TEST SUPPLIER 1 | | 200 | 0 | 0 | BOL_UDF8 | 3 | BOL_UDF7 | 19-MAY-2018 |

If the value is increased to 25, all the POs on the appointment request are displayed without requiring the user to scroll through the list.

| ! | Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Loose Cartons | GOH | Bulky | Order Type | Class Group | EQ Order Type | Ad Date |
|---|-----|-----------------|------------------|------------|-----------------|----------|---------------|-----|-------|------------|-------------|---------------|-------------|
| * | | TEST_PO_3013696 | TEST_BOL_3013696 | TEST1 | TEST SUPPLIER 1 | | 0 | 0 | 150 | BOL_UDF8 | 1 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013689 | TEST_BOL_3013689 | TEST1 | TEST SUPPLIER 1 | | 6 | 0 | 2 | BOL_UDF8 | 0 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013690 | TEST_BOL_3013690 | TEST1 | TEST SUPPLIER 1 | | 7 | 1 | 5 | BOL_UDF8 | 1 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013691 | TEST_BOL_3013691 | TEST1 | TEST SUPPLIER 1 | | 100 | 0 | 0 | BOL_UDF8 | 0 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013692 | TEST_BOL_3013692 | TEST1 | TEST SUPPLIER 1 | | 0 | 125 | 0 | BOL_UDF8 | 1 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013694 | TEST_BOL_3013694 | TEST1 | TEST SUPPLIER 1 | | 200 | 0 | 0 | BOL_UDF8 | 3 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013695 | TEST_BOL_3013695 | TEST1 | TEST SUPPLIER 1 | | 0 | 175 | 0 | BOL_UDF8 | 0 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3003686 | TEST_BOL_3003686 | TEST1 | TEST SUPPLIER 1 | | 1 | 0 | 1 | BOL_UDF8 | 0 | BOL_UDF7 | 5-JUL-2018 |
| * | | TEST_PO_3013697 | TEST_BOL_3013697 | TEST1 | TEST SUPPLIER 1 | | 3 | 2 | 3 | BOL_UDF8 | 2 | BOL_UDF7 | 19-MAY-2018 |
| * | | TEST_PO_3013698 | TEST_BOL_3013698 | TEST1 | TEST SUPPLIER 1 | | 4 | 3 | 2 | BOL_UDF8 | 3 | BOL_UDF7 | 19-MAY-2018 |

- Default Appointment Requested Time to Beginning of Day:** When enabled, this setting defaults the appointment request time to 00:00. This feature is intended to ensure that, when auto-scheduling is used, the distribution center's (DC) doors are booked starting from the early open hours.

Some carriers and suppliers are booking their appointments for the next day in the afternoon. In some cases, they do not pay attention to the time component of the date/time value in the "Requested Date" control, which is defaulted to the user's current time. So, these users may only adjust the requested date and submit their appointment requests, which are auto-approved to the exact requested time (or later if alternatives are offered). With this use pattern, the approved appointments can be highly clustered in the afternoon with very few requests in the morning. This setting was added to help address this issue.

Standing Appointment Settings

- Auto-Generate Standing Shells
- Maximum Number of Days Out to Generate Standing Shells (No more than 365, Default: 120)
- +/- Hours from Appointment Requested Date to Select Merge Candidates

In the Standing Appointment Settings section, specify the following:

- Auto-Generate Standing Shells:** When this setting is enabled, the system will automatically generate standing appointment shells for standing appointments in the system. When the **Auto-Generate Standing Shells** global setting is used in

combination with the settings allowing the scheduling of standing appointments for a set number of days in the future, users do not have to remember to update a standing appointment's Ending Date when an extension is needed.

- Number of days out that standing appointment instances are generated
- Number of hours from the appointment requested date to select merge candidates

Miscellaneous Settings

Comment is required to move appointment to "NO Show"

Comment is required to cancel the appointment

Send appointment e-mail notifications to line level suppliers

Note to include with appointment e-mail notification (max 512 characters):

globally defined custom text

In the Miscellaneous Settings section, specify the following:

- **Comment is required to mark appointment as 'No Show':** When enabled, makes the Comment field required on the **No Show** window.
- **Comment is required to cancel the appointment:** When enabled, makes the Comment field required on the **Cancel** window.
- **Send appointment e-mail notifications to line level suppliers:** When enabled, instructs the system to send a separate email notification to line-level suppliers for appointment-related events.
 - One email is sent to header-level subscribers with appointment lines (DC subscribers and header-level carriers/suppliers)
 - A separate email is sent to appointment line-level suppliers without appointment lines

When this setting is disabled, one email is sent to header-level subscribers as in previous versions.

Private email information is hidden as follows with this feature:

- When an email notification is sent to line level suppliers, the list of recipients is added to the BCC field of the email.
- The list of email addresses is hidden from logged in line level suppliers on the Email Notification popup from the Appointment History page.
- **Note to include with appointment e-mail notification:** Allows Global Admin users to enter custom text that will be included in predefined fields on appointment email notifications and print outs. This field has a limit of 512 characters.

| Appointment Extraction Settings | | | |
|-------------------------------------|---|----------------------|--|
| <input checked="" type="checkbox"/> | Do Appointment Extraction At Check-in | | |
| GLN Sender ID: | <input type="text" value="URN:DUNS:210307906M"/> | GLN Receiver ID: | <input type="text" value="URN:DUNS:210307907M"/> |
| | GLN Action: | | <input type="text" value="URN:MYVAN:163M"/> |
| Address: | <input type="text" value="https://wwwtest.myvan.descartes.com/HttpUpload/SimpleUploadHandler(M).aspx"/> | | |
| User Name: | <input type="text" value="GLNUser"/> | Reset Password: | <input checked="" type="checkbox"/> |
| | Password: | <input type="text"/> | Confirm Password: |
| | <input type="text"/> | | <input type="text"/> |

When the **Appointment Extraction At Check-in** setting is checked, several new fields appear, allowing implementation specialists to configure Dock Appointments Scheduling to send the most current appointment information in real time to a client's WMS when an appointment is checked in.

The required Dataflow configuration is performed automatically by Dock Appointments Scheduling using these field values. The new fields are:

- **GLN Sender ID, Receiver ID, GLN Action**
- **Address:** The GLN URL
- **User Name:** A valid GLN user name
- **Reset Password:** Click **Reset Password** to enter or change the current GLN password for the user. Please note that this setting *cannot* be used to change a user's password in GLN. It only allows the password value used by Dataflow (the intermediary system) to be changed.

When this setting is disabled, no appointment extraction will be performed, but all values enter in these fields is retained and will appear when checked again.

| Default Inbox Preferences | | | |
|---|--|--|---|
| CARRIER | SUPPLIER | COORDINATOR | CHECKIN |
| <input type="text"/> ▼ Max Appointment Age (days) | <input type="text"/> ▼ Max Appointment Age (days) | <input type="text"/> ▼ Max Appointment Age (days) | <input type="text"/> ▼ Max Appointment Age (days) |
| <input checked="" type="checkbox"/> Created (Draft) | <input checked="" type="checkbox"/> Created (Draft) | <input checked="" type="checkbox"/> Created (Draft) | <input type="checkbox"/> Created (Draft) |
| <input checked="" type="checkbox"/> Submitted | <input checked="" type="checkbox"/> Submitted | <input checked="" type="checkbox"/> Submitted | <input type="checkbox"/> Submitted |
| <input checked="" type="checkbox"/> Refused/Cancelled | <input checked="" type="checkbox"/> Refused/Cancelled | <input checked="" type="checkbox"/> Refused/Cancelled | <input type="checkbox"/> Refused/Cancelled |
| <input checked="" type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier | <input checked="" type="checkbox"/> Cancelled by Carrier/Supplier |
| <input checked="" type="checkbox"/> Approved | <input checked="" type="checkbox"/> Approved | <input checked="" type="checkbox"/> Approved | <input checked="" type="checkbox"/> Approved |
| <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived |
| <input type="checkbox"/> Departed | <input type="checkbox"/> Departed | <input type="checkbox"/> Departed | <input type="checkbox"/> Departed |
| <input type="checkbox"/> No Show | <input checked="" type="checkbox"/> No Show | <input type="checkbox"/> No Show | <input type="checkbox"/> No Show |
| <input type="checkbox"/> Standing | <input type="checkbox"/> Standing | <input checked="" type="checkbox"/> Standing | <input type="checkbox"/> Standing |
| <input checked="" type="checkbox"/> Hide Acknowledged Cancellations | | | <input type="checkbox"/> Hide Acknowledged Cancellations |

In the Default Inbox Preferences section, check or uncheck the boxes next to the type of appointments you want users in the system to see in his or her inbox. These settings apply until a logged-in user modifies their inbox settings from the **Inbox Preferences** window. Basically, users are divided into two groups:

- Users who set their own preferences are not affected by changes made to the Default Inbox Preferences for their user type.
- Users who have not set their own preferences, including newly created users, rely on the Default Inbox Preferences for their user type and are immediately affected by any changes made to these preferences.

➡ **Note**— When the **Inbox Preferences** window is displayed, users see the actual configuration used to select appointments for the user's **Dashboard**, regardless of whether the configuration is a default or a custom configuration. When you click **Save** on the **Inbox Preferences** window, a custom copy is created even if no modifications are made to the settings, which means that the default inbox preferences no longer apply. Click the **Reset** button to revert your inbox preferences to the default.

The Dashboard hides appointments older than the number of days (up to 30 days) selected from the **Max Appointment Age (days)** dropdown for the associated user type. Select **No Limit** from the dropdown if you do not want to impose an age limit on appointments displayed on the Dashboard for a user type.

Click **Save** when finished.

Template-W Global Settings

In the Global Settings section, specify the following:

- Appointments that are marked as deleted and checked-in after a certain number of days, enter the number of days in the fields Deleted Age and Checked-In Age.
- The maximum number of POs permitted per appointment
- Reminder email setting: specify the number of hours before an approved appointment to send a reminder email to carriers and/or suppliers. To disable this setting, leave the field blank.

Once the global setting is enabled with a set number of hours, users can turn this functionality on and off per Carrier User, Carrier Terminal, Supplier User and Supplier Terminal from the **Carrier Details** and **Supplier Details** pages.

| User Name | Email Address |
|----------------|---------------------|
| DSG Carrier | @descartes.com_bkup |
| test carrier | @descartes.com_bkup |
| test carrier 2 | |

DSG Carrier

Send Email When... an appointment request is approved
 an appointment request is rejected
 an appointment request is cancelled
 an appointment request is submitted with PO warnings
 an appointment is re-scheduled
 an appointment is marked as no-show
 an appointment has arrived
 an appointment has departed
 a comment is added to the appointment by another party
 a appointment request is deleted
 CC on the appointment updates made by this party
 reminder e-mail 72 hrs before appointment time

NEW DELETE

Contact:
 Phone:
 Fax:

LOCATION EMAIL PREFERENCES

Email Address:

Send Email When... an appointment request is approved
 an appointment request is rejected
 an appointment request is cancelled
 an appointment request is submitted with PO warnings
 an appointment is re-scheduled
 an appointment is marked as no-show
 an appointment has arrived
 an appointment has departed
 a comment is added to the appointment by another party
 a appointment request is deleted
 CC on the appointment updates made by this party
 reminder e-mail 72 hrs before appointment time

NEW DELETE

When saved, the value specified on the **Global Settings** page automatically updates the value displayed in the checkbox description on the **Carrier Details** and **Supplier Details** pages. If this setting is disabled (blank value), the checkbox does not display on the **Carrier Details** and **Supplier Details** pages.

Records of these emails will appear in the Email Notification column on the **Appointment History** list page.

Carrier Self Registration: When the DA Global Admin enables the **Allow Carrier Self-Registration** option on the **Global Settings** page, the system checks if the 'DA Unregistered Carrier (Model)' user group and the 'DA Unregistered Carrier' user role exist and then performs the following actions where appropriate.

- The system will create the 'DA Unregistered Carrier (Model)' user group and 'DA Unregistered Carrier' role if they do not exist.
- The system will activate the 'DA Unregistered Carrier (Model)' user group if it already exists.

When the DA Global Admin disables the **Allow Carrier Self-Registration** option, the system will deactivate the 'DA Unregistered Carrier (Model)' user group.

For more information, please see the *Carrier Self-Registration Process* section.

Disable Manual Approval for Request with Invalid Line Items: Allows administrators to disable manual appointment approval for appointment requests that contain invalid purchase orders (POs). With this setting enabled, the following error message is returned when users attempt to approve an invalid PO from the

appointment lists or the **Appointment Details** page: "This Appointment Request cannot be approved because it contains invalid lines."

If the **Validate Appointment Date Against POs Delivery Date** global setting is enabled in conjunction with the **Disable Manual Approval for Request with Invalid Line Items** setting, then the system will also check if the PO delivery date is valid.

A client's security administrator can also control which PO validation codes and PO Delivery Date validation codes are acceptable for manual approval. The text-keys used for configuration are described in *Text-Keys Related to PO Validation Codes*.

| Auto Scheduling Global Settings | |
|-------------------------------------|--|
| Never | ▼ Auto Scheduling Option |
| <input checked="" type="checkbox"/> | Validate AutoSchedule Appointment Line PO/ASN |
| <input type="checkbox"/> | Validate Appointment Date Against POs Delivery Date |
| <input type="checkbox"/> | Auto-Approved Appointment Assumes Standing Shell Duration (when use standing shell option is selected) |

In the Auto Scheduling Global Settings section, specify the following:

- **Validate AutoSchedule Appointment Line PO/ASN:** When enabled, this setting prevents submitted appointments with overridden purchase order or ASN values from being autoscheduled.
- **Validate Appointment Date Against POs Delivery Date:** When enabled, this setting activates validation of the selected Requested Date value on the **Create Appointment Request** and **Appointment Details** pages against the delivery date requirements displayed in the PO Delivery Date fields of purchase orders added. Configurable color coding can be used to indicate error and warning conditions for this threshold.
- **Auto-Approved Appointment Assumes Standing Shell Duration:** When this setting is enabled, for auto-approved appointments with the **Use standing shell** option selected, the system will use the planned duration of the standing appointment shell instead of updating the appointment with the duration value calculated by auto-scheduling.

| Appointment Detail Form Settings | |
|----------------------------------|--|
| <input type="checkbox"/> | Do Not Prepopulate Carrier |
| <input type="checkbox"/> | Prepopulate Supplier |
| <input type="checkbox"/> | Do Not Prepopulate Ship To (Distribution Center) |

In the Appointment Detail Form Settings section, specify the following:

- **Do Not Prepopulate Carrier:** Select this option to disable the prepopulation of the Carrier field based on the previous appointment created

- **Prepopulate Supplier:** Select this option to enable the prepopulation of the Supplier field based on the previous appointment created
- **Do Not Prepopulate Ship To (Distribution Center):** Select this option to disable the prepopulation of the Ship To field based on the previous appointment created

Standing Appointment Settings

Auto-Generate Standing Shells

Maximum Number of Days Out to Generate Standing Shells (No more than 365, Default: 120)

+/- Hours from Appointment Requested Date to Select Merge Candidates

In the Standing Appointment Settings section, specify the following:

- **Auto-Generate Standing Shells:** When this setting is enabled, the system will automatically generate standing appointment shells for standing appointments in the system. When the **Auto-Generate Standing Shells** global setting is used in combination with the settings allowing the scheduling of standing appointments for a set number of days in the future, users do not have to remember to update a standing appointment's Ending Date when an extension is needed.
- Number of days out that standing appointment instances are generated
- Number of hours from the appointment requested date to select merge candidates

Miscellaneous Settings

Comment is required to move appointment to "NO Show"

Comment is required to cancel the appointment

Note to include with appointment e-mail notification (max 512 characters):

In the Miscellaneous Settings section, specify the following:

- **Comment is required to mark appointment as 'No Show':** When enabled, makes the Comment field required on the **Delivery Failure** window.
- **Comment is required to cancel the appointment:** When enabled, makes the Comment field required on the **Cancel** window.
- **Note to include with appointment e-mail notification:** Allows Global Admin users to enter custom text that will be included in predefined fields on appointment email notifications and print outs. This field has a limit of 512 characters.

Appointment Extraction Settings

Do Appointment Extraction At Check-in

GLN Sender ID: GLN Receiver ID: GLN Action:

Address:

User Name: Reset Password:

When the **Appointment Extraction At Check-in** setting is checked, several new fields appear, allowing implementation specialists to configure Dock Appointments Scheduling to send the most current appointment information in real time to a client's WMS when an appointment is checked in.

The required Dataflow configuration is performed automatically by Dock Appointments Scheduling using these field values. The new fields are:

- **GLN Sender ID, Receiver ID, GLN Action**
- **Address:** The GLN URL
- **User Name:** A valid GLN user name
- **Reset Password:** Click **Reset Password** to enter or change the current GLN password for the user. Please note that this setting *cannot* be used to change a user's password in GLN. It only allows the password value used by Dataflow (the intermediary system) to be changed.

When this setting is disabled, no appointment extraction will be performed, but all values enter in these fields is retained and will appear when checked again.

Default Inbox Preferences

| CARRIER | SUPPLIER | COORDINATOR | CHECKIN |
|--|--|--|--|
| <input type="text"/> Max Appointment Age (days) | <input type="text"/> Max Appointment Age (days) | <input type="text"/> Max Appointment Age (days) | <input type="text"/> Max Appointment Age (days) |
| <input type="checkbox"/> No Limit | <input checked="" type="checkbox"/> Created (Draft) | <input type="checkbox"/> Created (Draft) | <input type="checkbox"/> Created (Draft) |
| <input type="checkbox"/> Draft | <input checked="" type="checkbox"/> Submitted | <input checked="" type="checkbox"/> Submitted | <input type="checkbox"/> Submitted |
| <input type="checkbox"/> Draft/Cancelled | <input checked="" type="checkbox"/> Refused/Cancelled | <input type="checkbox"/> Refused/Cancelled | <input type="checkbox"/> Refused/Cancelled |
| <input type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier |
| <input type="checkbox"/> Approved | <input checked="" type="checkbox"/> Approved | <input type="checkbox"/> Approved | <input type="checkbox"/> Approved |
| <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived |
| <input type="checkbox"/> Departed | <input type="checkbox"/> Departed | <input type="checkbox"/> Departed | <input type="checkbox"/> Departed |
| <input checked="" type="checkbox"/> Delivery Failure | <input checked="" type="checkbox"/> Delivery Failure | <input type="checkbox"/> Delivery Failure | <input type="checkbox"/> Delivery Failure |
| <input type="checkbox"/> Standing | <input type="checkbox"/> Standing | <input type="checkbox"/> Standing | <input type="checkbox"/> Standing |
| <input type="checkbox"/> Hide Acknowledged Cancellations | | | |

In the Default Inbox Preferences section, check or uncheck the boxes next to the type of appointments you want users in the system to see in his or her inbox. These settings apply until a logged-in user modifies their inbox settings from the **Inbox Preferences** window. Basically, users are divided into two groups:

- Users who set their own preferences are not affected by changes made to the Default Inbox Preferences for their user type.

- Users who have not set their own preferences, including newly created users, rely on the Default Inbox Preferences for their user type and are immediately affected by any changes made to these preferences.
 - ➔ **Note**— When the **Inbox Preferences** window is displayed, users see the actual configuration used to select appointments for the user's **Dashboard**, regardless of whether the configuration is a default or a custom configuration. When you click **Save** on the **Inbox Preferences** window, a custom copy is created even if no modifications are made to the settings, which means that the default inbox preferences no longer apply. Click the **Reset** button to revert your inbox preferences to the default.

The Dashboard hide appointments older than the number of days (up to 30 days) selected from the **Max Appointment Age (days)** dropdown for the associated user type. Select **No Limit** from the dropdown if you do not want to impose an age limit on appointments displayed on the Dashboard for a user type.

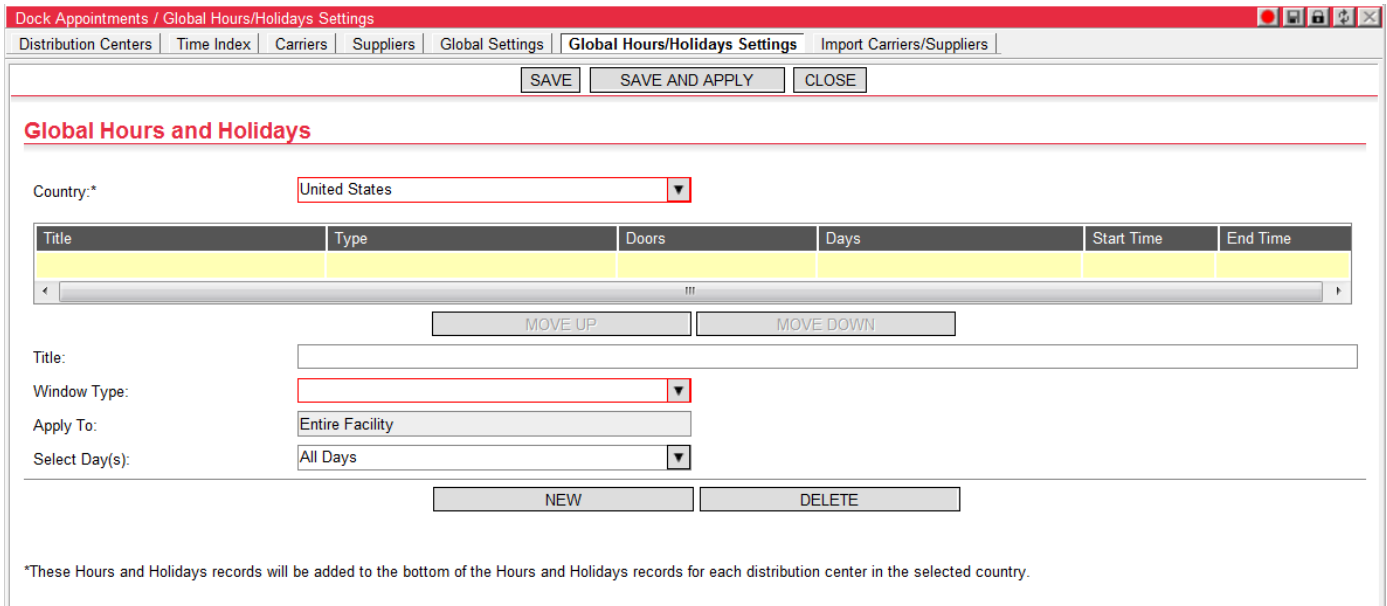
Click **Save** when finished.

Setting Up Global Hours/Holidays

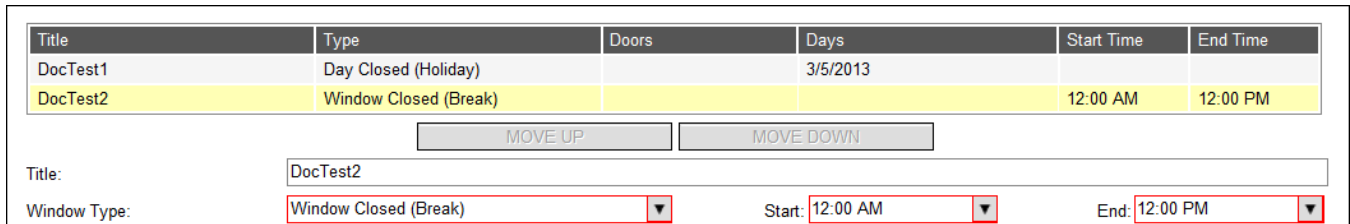
From the **Global Hours/Holidays Settings** page DA Admin users (global admin) can create holidays and hours settings that apply to all DCs belonging to a specified country.

To create global holidays per country:

- 1 Select **Dock Appointments > Setup > Global Hours/Holidays** from the main menu. The **Global Hours/Holidays Settings** page appears.



- 2 Select the country to which the settings will apply.
- 3 Enter the Title of the new row, a holiday name or break designation.
- 4 Enter the **Window Type**, the kind of holiday or break desired. For the **Window Closed (Break)** and **Window Open (Override Break)** options, choose the start and end times for the break or override using the dropdowns.



- 5 From the **Select Day(s)** dropdown, choose the mode of time selection:
 - For the Single Day or Date Range option, use the calendar control to select the date or date range.

| Title | Type | Doors | Days | Start Time |
|----------|----------------------|-------|----------|------------|
| DocTest1 | Day Closed (Holiday) | | 3/5/2013 | |

MOVE UP MOVE DOWN

Title: DocTest1

Window Type: Day Closed (Holiday) ▼

Apply To: Entire Facility

Select Day(s): Single Day ▼ Date: 3/5/2013

NEW DEL

*These Hours and Holidays records will be added to the bottom of the Hours and Holidays records for each

◀ 2013 ▶

| | | | | | | |
|----|----|----|----|----|----|----|
| S | M | T | W | T | F | S |
| 31 | | | | | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

- For the **Weekday(s)** option, use the checkboxes to set particular days of the week for holidays and breaks all year.

| Title | Type | Doors | Days | Start Time | End Time |
|----------|-----------------------|-------|----------|------------|----------|
| DocTest1 | Day Closed (Holiday) | | 3/5/2013 | | |
| DocTest2 | Window Closed (Break) | | | 12:00 AM | 12:00 PM |

MOVE UP MOVE DOWN

Title: DocTest2

Window Type: Window Closed (Break) ▼ Start: 12:00 AM ▼ End: 12:00 PM ▼

Apply To: Entire Facility

Select Day(s): Weekday(s) ▼

Weekday(s): Sun Mon Tue Wed Thu Fri Sat

NEW DELETE

- For the **Weekday(s) in Date Range** option, use the checkboxes to set particular days of the week during a certain date range specified via calendar control.

| Title | Type | Doors | Days | Start Time | End Time |
|----------|-----------------------|-------|-------------|------------|----------|
| DocTest1 | Day Closed (Holiday) | | 3/5/2013 | | |
| DocTest2 | Window Closed (Break) | | . M. W. . . | 12:00 AM | 12:00 PM |

MOVE UP MOVE DOWN

Title: DocTest2

Window Type: Window Closed (Break) ▼ Start: 12:00 AM ▼ End: 12:00 PM ▼

Apply To: Entire Facility

Select Day(s): Weekday(s) in Date Range ▼ Start: [calendar] End: [calendar]

Weekday(s): Sun Mon Tue Wed Thu Fri Sat

NEW DELETE

- 6 To keep the specified holiday/hour setting and add a new row, click **New**. To remove a setting from the table, select the setting to highlight it and click **Delete**. When finished, click **Save** to save all data on the page but not apply it.
- 7 Use the **Move Up** and **Move Down** buttons to set priorities for the settings. Records are processed from top to bottom.
- 8 Click **Save and Apply** to save all data specified on the page and apply the created settings to all DCs for the selected country in the system.

In the following example, hours and holidays are set for a particular DC by a local DC Admin.

Hours and Holidays

| Title | Type | Doors | Days | Start Time | End Time |
|-------------------|------------------------------------|-------|-----------|------------|----------|
| Op Hours | Operating Hours (Start/End of Day) | | . MTWHF. | 7:00 AM | 7:00 PM |
| Important Holiday | Day Closed (Holiday) | | 6/12/2013 | | |

MOVE UP
MOVE DOWN

Title:

Window Type: Day Closed (Holiday) ▼

Apply To: ▼

Select Day(s): ▼ Date: 6/12/2013 🗓️

NEW
DELETE

When the global administrator sets and applies the global holidays and hours created above, those settings are added to the local DC's list, as shown below.

Hours and Holidays

| Title | Type | Doors | Days | Start Time | End Time |
|-------------------|------------------------------------|-------|-----------|------------|----------|
| Op Hours | Operating Hours (Start/End of Day) | | .MTWHF. | 7:00 AM | 7:00 PM |
| Important Holiday | Day Closed (Holiday) | | 6/12/2013 | | |
| DocTest1 | Day Closed (Holiday) | | 3/5/2013 | | |
| DocTest2 | Window Closed (Break) | | .M.W... | 12:00 AM | 12:00 PM |

Title:

Window Type:

Apply To:

Select Day(s): Date:

The end result is combination of records. If there is a conflict between records, the global record overrides the local record. For example, if local currently has

- Open hours (MTWTF 7 a.m. to 7 p.m.)
- Christmas (closed from 12 p.m. to midnight)

and global side has one record

- Christmas (closed all day)

when the applied to DC, the local DC now has

- Open hours (MTWTF 7 a.m. to 7 p.m.)
- Christmas (closed from 12 p.m. to midnight)
- Christmas (closed all day)

The last record, the global record, will override the local record and the DC will be closed all day on Christmas.

After global records are applied to a DC, any further changes from the global admin to those global records will update applied records for each local DC automatically.

Continuing with the example above, the global admin changes the Christmas holiday from "closed all day" to "closed from 11 am to midnight" and then applies the change.

Now the local DC has the following records:

- Open hours (MTWTF 7 a.m. to 7 p.m.)

- Christmas (closed from 12 p.m. to midnight)
- Christmas (closed from 11 a.m. to midnight)

Notice the local DC automatically receives the update to the global record.

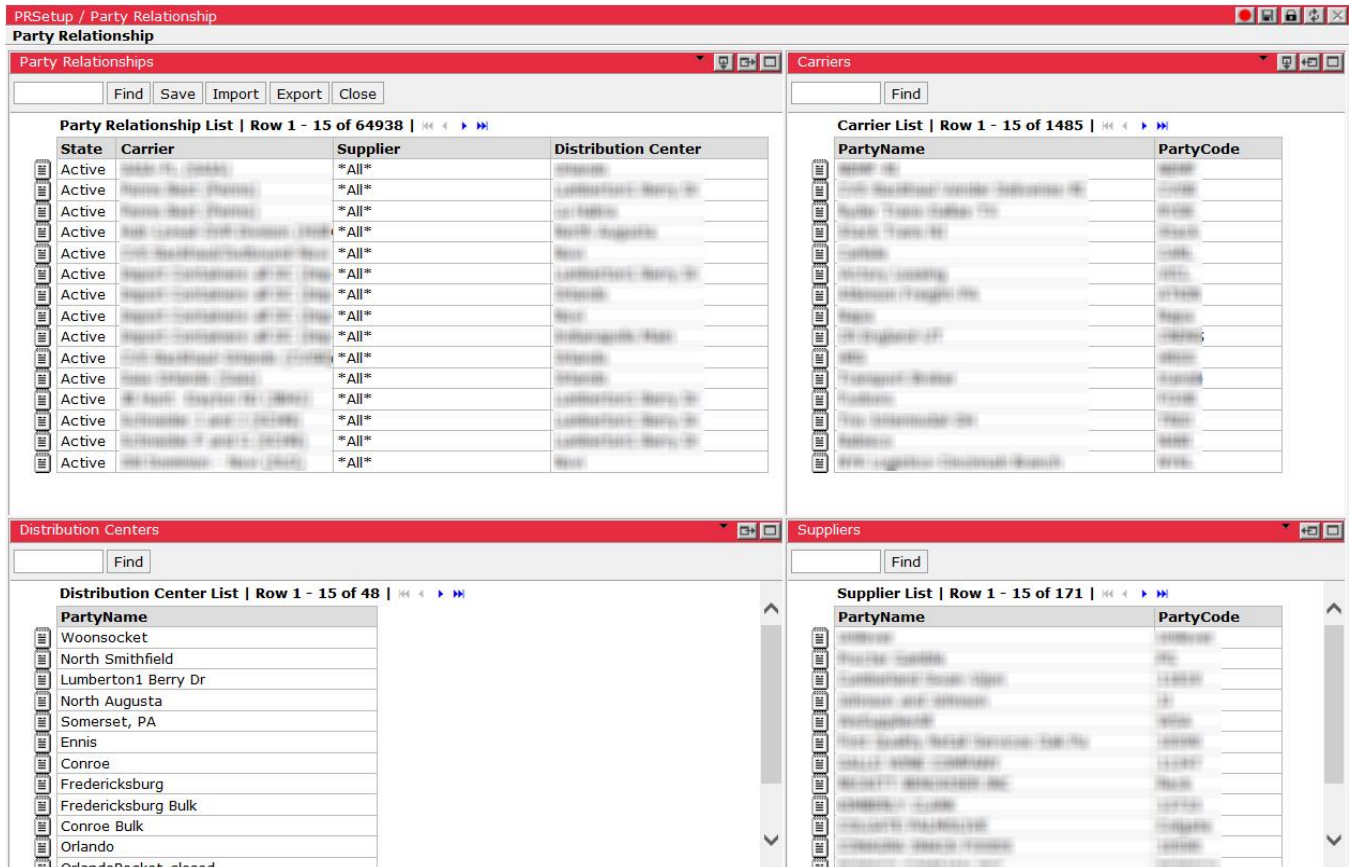
However, if the DC Admin modified the global record locally *before* the DA Admin modified and applied the new hours for Christmas, the local record would not be updated automatically with the new information.

So, if the DC Admin changes the global record on the DC's Hours and Holidays list from "Christmas, closed 11 a.m. to midnight" to "Christmas, closed 10 a.m. to 12 p.m.", this edit disconnects the local record from its association with the global record, and when the global admin modifies the original record, the local record remains "Christmas, closed 10 a.m. to 12 p.m.."

Setting Party Relationships

The user can define relationships between carrier, supplier and DC parties that control access to selecting other parties while booking an appointment. These relationships can be used to restrict suppliers for which a carrier can ship, DCs a carrier can ship or DCs a carrier can ship to for a particular supplier. They can be defined using the drag-and-drop user interface or can be imported from a spreadsheet.

To set relationships between suppliers, carriers and DCs, select **Dock Appointments > Setup > Party Relationship**. The **Party Relationships** page appears.



Note— For more details on customizing a quadrant, please see [Appendix A: Using a Quadrant Page](#).

The **Party Relationship** page allows the user to drag-and-drop carriers, suppliers and DCs into a single menu that is fully customizable. This information is used to pre-populate fields in Descartes Dock Appointments Scheduling.

To create a new relationship:

- 1 Drag a desired carrier, supplier or DC from their respective quadrant to a blank space in the **Party Relationships** quadrant. New additions will be marked with the text 'New' in the State column.
- 2 Fill in the other fields with a matching carrier, supplier and/or DC. In order to have an item associated with all variables in a category, right click on a row marked 'New' and select either All Suppliers, All Carriers or All DCs from the right-click menu.

Once a choice has been made for each field, the State of the completed party relationship will change from 'New' to 'Pending'.

- 3 Click **Save** to save the pending relationships, changing their State from Pending to Active.

Or,

Click **Import** and select the desired spreadsheet to upload. Descartes Dock Appointments Scheduling will display the uploaded data in the relationships table.

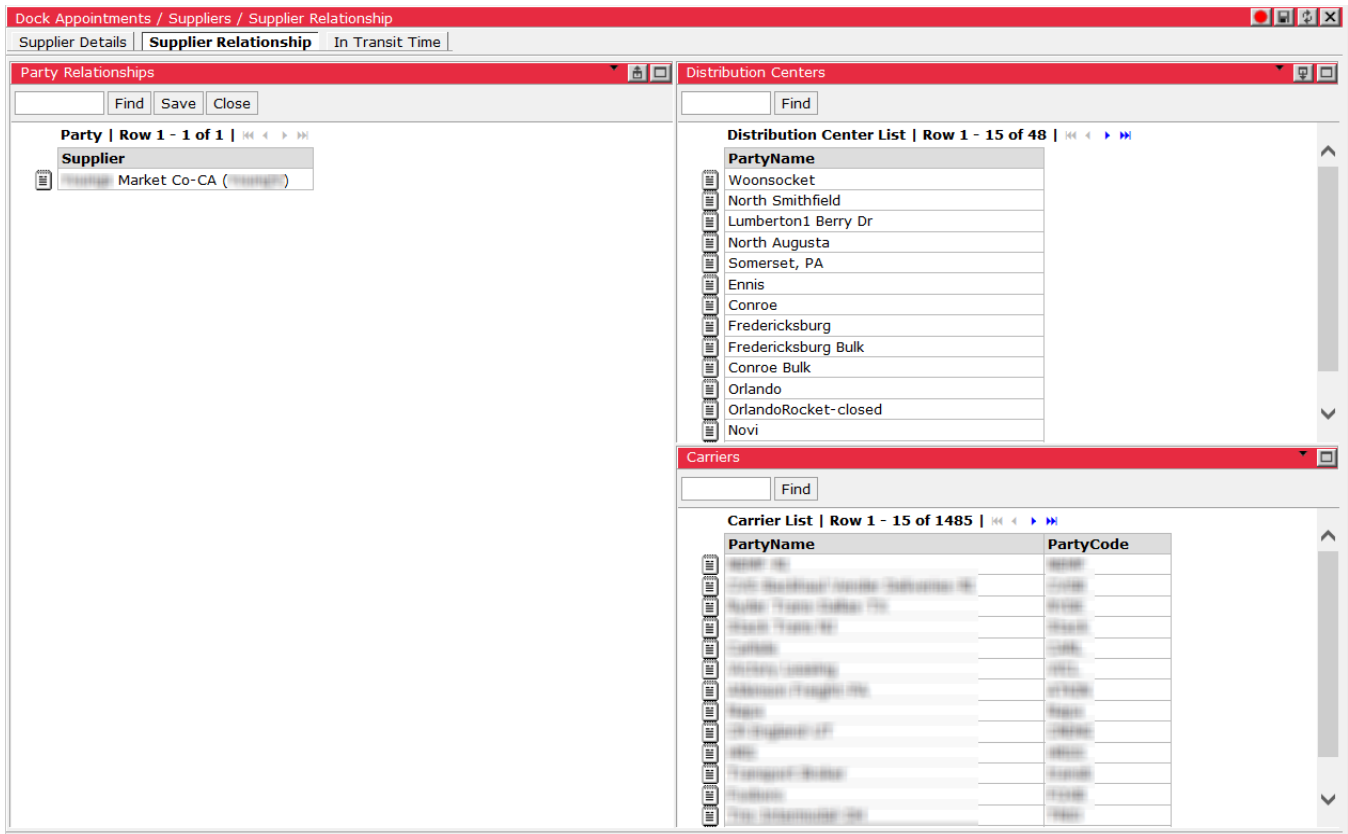
Viewing and Editing a DC, Carrier or Supplier

To view and edit a DC, Carrier, or Supplier:

- 1 From the **Distribution Centers, Carriers, or Suppliers** list pages, right-click on desired DC, Carrier, or Supplier and select the **(DC, Carrier, or Supplier) Details**.
The **Details** page appears.
- 2 Make any desired changes and select **Save**. If no changes are made, select **Close**.

Editing Relationships from the DC, Carrier or Supplier List Page

Party Relationships can be edited by right-clicking on a DC, Carrier or Supplier from the respective list page and selecting the **DC, Carrier or Supplier Relationship** option from the right-click menu. The example below is from selecting **Supplier Relationships**:



The quadrant page has three panes, one for **Party Relationships**, **Distribution Centers** and **Carriers**. By dragging and dropping DCs or Carriers, the relationships can be customized for a single Supplier instead of all Suppliers, Carriers and DCs at once. This can be done for all individual Suppliers, Carriers and DCs from the respective list pages.

Deleting Users from a DC, Carrier or Supplier

To delete (remove) a user from a DC, Carrier or Supplier:

- 1 From the **Distribution Center**, **Carrier** or **Supplier Details** page, select the desired user from the user list (**Coordinator Users** list for DC, **Carrier Users** list for Carriers and **Supplier Users** for Suppliers).

DC Users

| User Name | Email Address | User Type |
|------------------------|-----------------------------|-------------------|
| DSG Check In | qatest02@descartes.com_bkup | Check-In |
| DSG Coordinator | qatest01@descartes.com_bkup | Coordinator |
| DSG DC Admin |@descartes.com | Admin |
| DSG DC Admin 2 | test@test.test | Admin |
| DSG DC Yard Jockey | | |
| DSG Gate Guard |@descartes.com | Gate Guard |
| DSG Shipping Receiving | | Shipping/Receivin |
| DSG View Only | | View Only |
| John papa | jpapa@descartes.com | |

DSG Check In | qatest02@descartes.com_bkup | Check-In

Send Email When... an appointment request is submitted by carrier/supplier
 an appointment request is submitted with PO warnings
 an appointment is cancelled by carrier/supplier
 an appointment is re-submitted by carrier/supplier
 an appointment is updated by carrier/supplier after approval
 a comment is added to the appointment by carrier/supplier
 a appointment request is deleted
 CC on the appointment updates made by this party

NEW DELETED EDIT USER

- 2 Select **Delete** under the list. The user will be removed from the list but will still exist in the system.
- 3 Click **Save** to save the changes.

Deleting a DC, Carrier or Supplier

Note— Upon deletion, the DC, Carrier or Supplier entry is marked as deleted; however, it is preserved so that history files are still available for past appointments. You will not be able to create a new location with the same name as the deleted.

To delete (remove) a DC, Carrier, or Supplier from the respective list page:

- 1 Right-click on the desired DC, Carrier, or Supplier and select **Delete**.

| Dock Appointments / Distribution Centers | | | | |
|--|---------------|--------------------------------|----------------|-----------|
| Distribution Centers | Time Index | Appointment Line Validation... | Carriers | Suppliers |
| Import Carriers/Suppliers | | | | |
| Legend: ■ Active ■ Deleted | | | | |
| DC Name | Facility Code | Coordinators | Street Address | |
| Bessemer | ALA1 | | | |
| Chemung full cs | YKY1 | | | |
| Chemung Pharmacy | YKY2 | | | |
| Chemung-Waverly- NY | YKY1 | | | |
| Conroe | CRC1 | | | |
| Conroe Bulk | CRC3 | | | |

Distribution Center Details

- XDock Sorter Setup
- Door Schedule Setup
- Auto-Scheduling Setup
- DC Relationship
- Send Notification
- Copy Distribution Center
- Delete
- Resecure
- Export

LocationID = 11097

A message displays notifying you that the action cannot be undone and asking if you are sure you want to delete the item.

- 2 Click **Ok** to delete the DC, Carrier, or Supplier. It will be marked red on the list page, as shown below.

| Dock Appointments / Distribution Centers | | | |
|--|---------------|--------------------------------|----|
| Distribution Centers | Time Index | Appointment Line Validation... | Ca |
| Import Carriers/Suppliers | | | |
| Legend: ■ Active ■ Deleted | | | |
| DC Name | Facility Code | Coordinators | |
| Bessemer | ALA1 | | |
| Chemung full cs | YKY1 | | |

Or,

Click **Cancel** to cancel the deletion.

To delete (remove) a DC, Carrier, or Supplier from the **Details** page:

- 1 From the respective list page, right-click on the desired DC, Carrier, or Supplier; and select **(DC, Carrier, or Supplier) Details**.
- 2 On the **Details** page, select **Delete**.

A message displays notifying you that the action cannot be undone and asking if you are sure you want to delete the item.

- 3 Click **Ok** to delete the DC, Carrier, or Supplier; or click **Cancel** to cancel the deletion.

Reinstating a Deleted DC, Carrier or Supplier

To change the status of a deleted DC, Carrier or Supplier to **Active**:

- 1 Select **Dock Appointments > Setup** and click **Distribution Centers, Carriers** or **Suppliers**. The selected list page appears.
- 2 Right-click on a deleted DC, Carrier or Supplier from the list page and select **UnDelete** from the right-click menu. The selected DC, Carrier or Supplier will return to active status.

Importing and Exporting Distribution Centers

DC Admin users can import and export distribution centers in XML format in Descartes Dock Appointments Scheduling. This feature allows admin users to move distribution center details easily between environments.

Information provided on the following pages/tabs are included in the file:

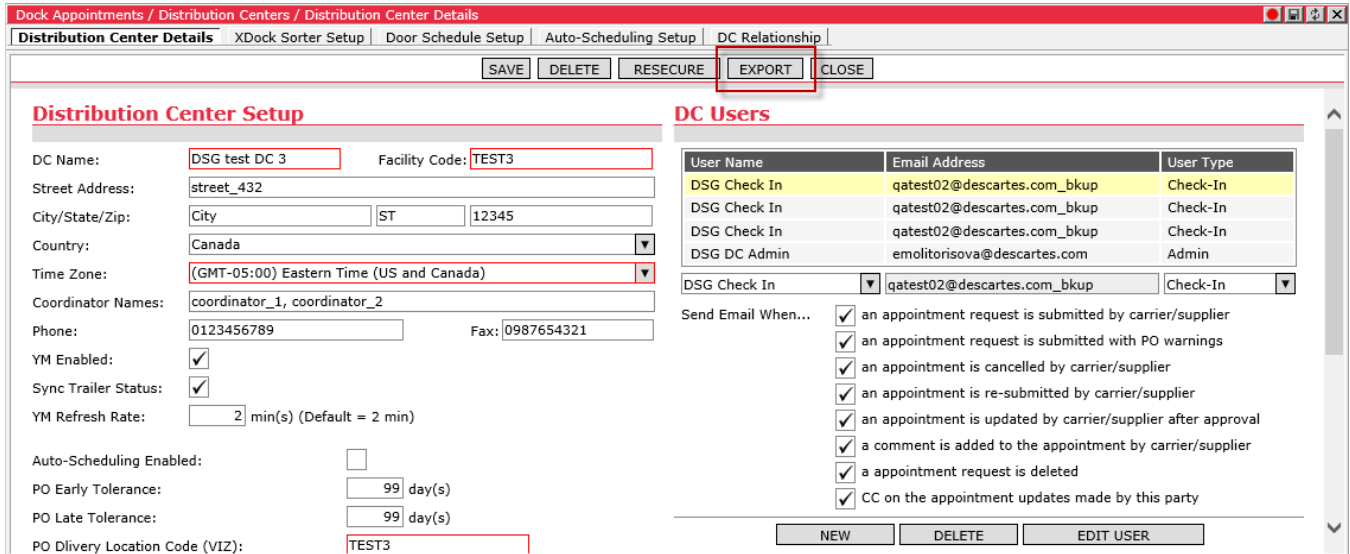
- **Distribution Center Details** page (except users)
- **XDock Sorter Setup** tab
- **Door Schedule Setup** tab
- **Auto-Scheduling Setup** tab
- **DC Relationship** tab – In order to import distribution center relationships properly, all related parties must already exist in the system. If no carriers or suppliers are present, then distribution center relationship records cannot be imported along with the distribution center.

To export a distribution center, do one of the following:

- From the **Distribution Centers** list page, right-click on the distribution center you wish to export and select **Export** from the right-click menu. The browser will prompt you with options to save or open the resulting file.

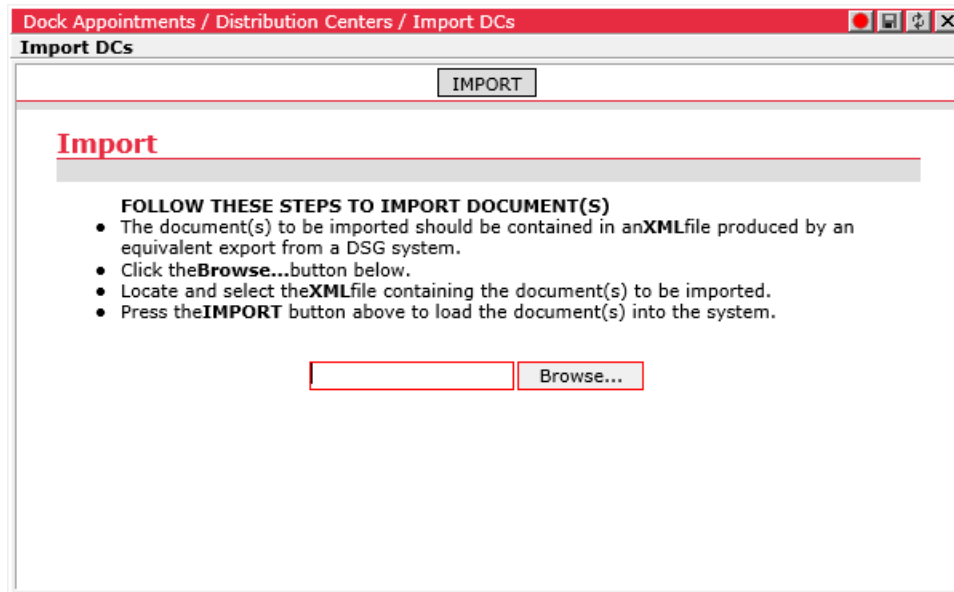
| DSG test DC 3 | TEST3 | coordinator_1, coordinator_2 |
|---------------------|-------|---|
| DSGtestDC | TEST | Distribution Center Details XDock Sorter Setup Door Schedule Setup Auto-Scheduling Setup DC Relationship Send Notification Copy Distribution Center Delete Resecure Export LocationID = 11580 <hr/> New Distribution Center Import DCs <hr/> Refresh Select All Select Columns Reset Columns Export List as CSV Export List as Tab-Delimited Export List as HTML Print List |
| DSGtestDC2 | TEST2 | |
| Ennis | ENE1 | |
| Ennis Pharmacy | ENE1 | |
| Fredericksburg | MAM1 | |
| Fredericksburg Bulk | MAM3 | |
| Hawaii | H1 | |
| Indianapolis CIG | INI7 | |
| Indianapolis Main | INI1 | |
| Indianapolis RX | INI2 | |
| Indy Mt | INI1 | |

- From the **Distribution Center Details** page, click the **Export** button. The browser will prompt you with options to save or open the resulting file.



To import a distribution center:

Right-click on the **Distribution Centers** list page and select the **Import DCs** option.



Click **Browse** and select the XML file you wish to import. Please note that only XML files generated by an equivalent export from a Descartes application can be imported.

Standing Appointments Shells Instant Approval Functionality

For clients using Template-C, users can configure the system to allocate and approve standing appointments automatically, eliminating the need to manually allocate and approve using standing appointment shells.

The **Enable Instant Approval of Standing Shells** option on the **Global Settings** page controls the instant approval functionality, activating a checkbox on the **Appointment Details** page.

To enable this functionality for new standing appointments, select the checkbox, **Approve Standing Shells Instantly** from the **Appointment Details** page.

With this option enabled, generated standing appointment shells are approved automatically. If a standing shell to be instantly approved occupies an invalid time period, the appointment request status is marked as "Standing Appointment (Door Blocked)" and left for resolution by the DC Admin. The following constitute an invalid time period:

- Standing appointment partially or completely falls within hours during which the selected door is closed

- Standing appointment overlaps an Approved or Arrived appointment or another standing appointment shell
 - ➔ **Note**— Since the DC Admin reviews Submitted appointments before approval, overlap of auto-approved standing appointments with Submitted appointments is not a concern.

Registering a Carrier for Self-Registration

DC Admins can register new carrier users in the system and provide the login information to them. The new carrier user themselves can then complete the registration process. This process is described in the *[Carrier Self-Registration Process](#)* section.

Acknowledging Appointment Cancellation by Carrier or Supplier

DC Admin users can mark an appointment cancelled by a carrier or supplier as acknowledged (in "Refused/Cancelled" status with the "Cancelled by Carrier/Supplier" reason code). This functionality allows users hide these appointments from the Dashboard, the corresponding appointments list page and the door assignment grid on the **Doors** page. This feature is detailed in the following sections.

- ➔ **Note**— An appointment can only be marked as acknowledged when it is in "Cancelled by Carrier/Supplier" status. If the status of an appointment marked as acknowledged is changed from "Cancelled by Carrier/Supplier," the flag is reset.

Acknowledging an Appointment Cancelled by Carrier/Supplier

Users can acknowledge an appointment in "Cancelled by Carrier/Supplier" status from the Dashboard and **Refused/Cancelled Appointment Requests** list pages or from the **Appointment Details** page.

List Pages

To mark a cancellation as acknowledged from the Dashboard or the **Refused/Cancelled Appointment Requests** list page, right-click on one or more appointments in "Cancelled by Carrier/Supplier" status and select the **Acknowledge Cancellation** option from the right-click menu.

| Dock Appointments / Refused/Cancelled Appointment Requests | | | | | |
|--|----------|-----------------|-------------------------------|--------------------------|------------------|
| Dashboard | Standing | Created (Draft) | Submitted | Refused/Cancelled | A |
| Hot | Status | Ackd | Reason Code | Last Modified On | Last Modified By |
| | | | Cancelled by Carrier/Supplier | 3/27/2018 6: | DSG Test Carrier |
| | | | Cancelled by Carrier/Supplier | 3/6: | ier |
| | | | Cancelled - Carrier No Show | 3/6: | |
| | | | Refused | 3/7: | |
| | | | Refused | 3/2: | |
| | | | Refused | 5/2: | |

Appointment Details

Appointment History

Submit

Approve

Delete

Print

Acknowledge Cancellation

AppointmentID = 632460

Create Appointment Request

Search Appointments

Refresh

Select All

Select Columns

Reset Columns

Export List as CSV

Export List as Tab-Delimited

Export List as HTML

Print List

A checkmark appears in the Ackd column for cancelled appointments marked as acknowledged. The Ackd column is hidden by default.

| Dock Appointments / Refused/Cancelled Appointment Requests | | | | | |
|--|----------|-----------------|-------------------------------|--------------------------|------------------|
| Dashboard | Standing | Created (Draft) | Submitted | Refused/Cancelled | A |
| Hot | Status | Ackd | Reason Code | Last Modified On | Last Modified By |
| | | ✓ | Cancelled by Carrier/Supplier | 11/15/2018 11:17:44 AM | DA Admin |

To undo an acknowledgement, right-click on a marked appointment select the **Undo Acknowledge Cancellation** option from the right-click menu. The check is removed from the Ackd column.

| Dock Appointments / Refused/Cancelled Ap | | | | Appointment Details | |
|--|----------|-----------------|-------------------------------|--------------------------------------|--|
| Dashboard | Standing | Created (Draft) | | Appointment History | |
| Hot | Status | Ackd | Reason Code | Submit | |
| | | | Cancelled - Other | Approve | |
| | | | Cancelled - Carrier No Show | Delete | |
| | | | Cancelled - Carrier No Show | Print | |
| | | ✓ | Cancelled by Carrier/Supplier | Undo Acknowledge Cancellation | |
| | | | Cancelled by Carrier/Supplier | AppointmentID = 632460 | |
| | | | | Create Appointment Request | |
| | | | | Search Appointments | |
| | | | | Refresh | |
| | | | | Select All | |
| | | | | Select Columns | |
| | | | | Reset Columns | |
| | | | | Export List as CSV | |
| | | | | Export List as Tab-Delimited | |
| | | | | Export List as HTML | |
| | | | | Print List | |

Appointment Details


DC users can also mark a cancelled appointment as acknowledged from the **Appointment Details** page of an appointment in "Cancelled by Carrier/Supplier" status by clicking the **Ackn. Cancel** button.

Dock Appointments / Appointment Details - Request# 1632460


Appointment Details | Appointment History

UPDATE | RE-SUBMIT | AUTO-APPROVE | APPROVE | **ACKN. CANCEL** | SUBMIT

Track as hot appointment Yard Drop

| | | | |
|------------------------|--|------------------------|--|
| Status: | Refused/Cancelled | Reason Code: | Cancelled by Carrier/Supplier |
| Appointment Date/Time: | 3/28/2018 3:00 PM (01:15) | Door(s): | |
| Request Number: | 1632460 | Requested By: | DA Admin |
| Requested Date/Time: | 3/28/2018 12:30 PM  SUGGEST | Estimated Unload Time: | 01hr 00m <small>could be inaccurate due to insufficient data</small> |
| Trailer #: | <input type="text"/> Select Equipment Type... ▼ | Routing #: | <input type="text"/> |
| Carrier: | dsg test automation (123) - test terminal ▼ | Supplier: | <input type="text"/> |
| Driver: | Select Driver... ▼ | Preferred Carrier: | Select Preferred Carrier... ▼ |

If load was brokered to you by a preferred carrier or you are a supplier tendering load to a preferred carrier - select carrier name in drop down box above

The appointment refreshes and an icon  appears next to the Reason Code field to denote the acknowledgement.


When the cancelled appointment is marked as acknowledged in this way, the **Ackn. Cancel** button is replaced by **Undo Ackn. Cancel** button. To undo an acknowledgement, click the **Undo Ackn. Cancel** button. The icon is removed from the Reason Code field.

Dock Appointments / Appointment Details - Request# 1632460

Appointment Details | Appointment History


UPDATE | RE-SUBMIT | AUTO-APPROVE | APPROVE | **UNDO ACKN. CANCEL** | SUBMIT

Track as hot appointment Yard Drop

Status: Reason Code: 

Appointment Date/Time: Door(s):

Request Number: Requested By:

Requested Date/Time:  SUGGEST Estimated Unload Time: could be inaccurate due to insufficient data

Trailer #: Select Equipment Type... ▼ Routing #:

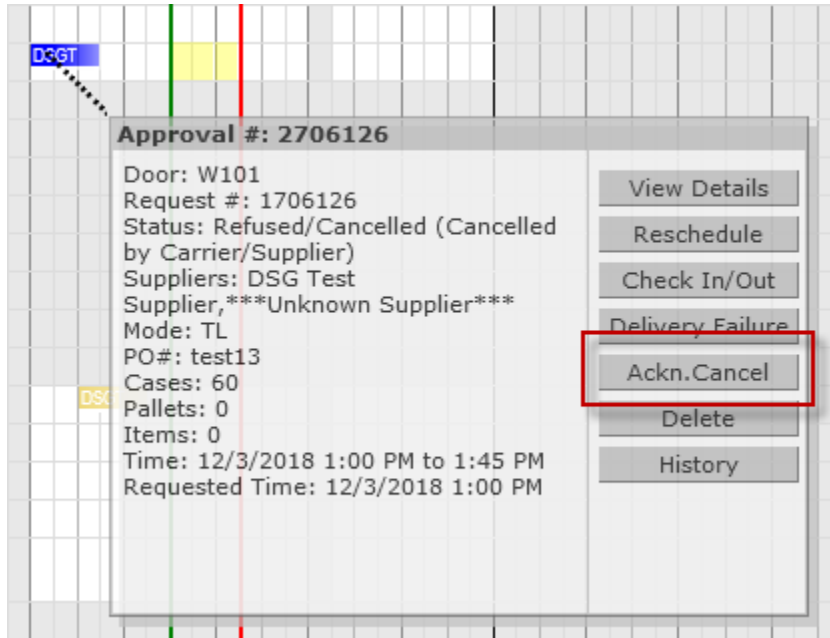
Carrier: ▼ Supplier:

Driver: ▼ Preferred Carrier: ▼

If load was brokered to you by a preferred carrier or you are a supplier tendering load to a preferred carrier - select carrier name in drop down box above

Door Grid

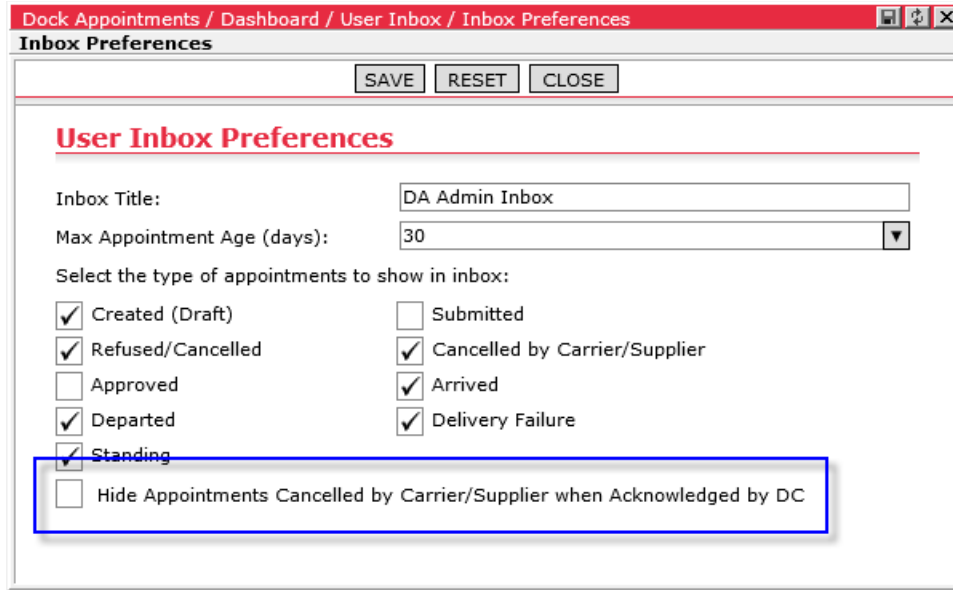
For appointments in "Cancelled by Carrier/Supplier" status, the **Cancel** button is replaced with the **Ackn. Cancel** button on the popup window displayed when users click an appointment on the **Doors** page.



When this button is clicked, a confirmation dialog appears, notifying users that the appointment will be removed from the **Doors** page if they proceed. When you click **OK**, the appointment is marked as acknowledged and removed from the page.

Inbox Preference Setting

The **Hide Appointments Cancelled by Carrier/Supplier...** setting allows DC users to display or hide appointments cancelled by a carrier or supplier on the Dashboard once they have been acknowledged.



This checkbox is hidden when the **Cancelled by Carrier/Supplier** checkbox is unchecked. For more information on custom versus default inbox preferences, please see [Configuring the Dashboard Inbox](#).

Global Settings

Use the **Hide Acknowledged Cancellations** checkbox to show or hide these appointments by default from inboxes for each user type.

| Default Inbox Preferences | | | |
|---|--|--|--|
| CARRIER | SUPPLIER | COORDINATOR | CHECKIN |
| <input checked="" type="checkbox"/> Created (Draft) | <input checked="" type="checkbox"/> Created (Draft) | <input type="checkbox"/> Created (Draft) | <input type="checkbox"/> Created (Draft) |
| <input checked="" type="checkbox"/> Submitted | <input checked="" type="checkbox"/> Submitted | <input checked="" type="checkbox"/> Submitted | <input type="checkbox"/> Submitted |
| <input checked="" type="checkbox"/> Refused/Cancelled | <input checked="" type="checkbox"/> Refused/Cancelled | <input type="checkbox"/> Refused/Cancelled | <input type="checkbox"/> Refused/Cancelled |
| <input checked="" type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier | <input type="checkbox"/> Cancelled by Carrier/Supplier |
| <input checked="" type="checkbox"/> Approved | <input checked="" type="checkbox"/> Approved | <input type="checkbox"/> Approved | <input type="checkbox"/> Approved |
| <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived | <input type="checkbox"/> Arrived |
| <input type="checkbox"/> Departed | <input type="checkbox"/> Departed | <input type="checkbox"/> Departed | <input type="checkbox"/> Departed |
| <input checked="" type="checkbox"/> Delivery Failure | <input checked="" type="checkbox"/> Delivery Failure | <input type="checkbox"/> Delivery Failure | <input type="checkbox"/> Delivery Failure |
| <input type="checkbox"/> Standing | <input type="checkbox"/> Standing | <input type="checkbox"/> Standing | <input type="checkbox"/> Standing |
| <input type="checkbox"/> Hide Acknowledged Cancellations | | | |

This checkbox is hidden when the **Cancelled by Carrier/Supplier** checkbox is unchecked for the user type.

Dashboard Filter

Cancelled appointments marked as acknowledged are shown or hidden on the Dashboard depending on the Inbox Preferences settings at the global (default) or user levels. User Inbox Preferences override any global settings. For more information on this functionality, please see [Configuring the Dashboard Inbox](#).

Carrier and Supplier Tasks

Carriers have access to appointment requests that identify the respective carrier in the request header. They can perform the following tasks:

- Create appointment requests with shipment information
- Create appointment requests against standing appointments
- Submit appointment requests to Coordinators for approval
- View appointment progress without access to door assignment and additional order information
- Add comments when necessary throughout the appointment process
- Cancel appointment requests
- Request a different appointment date and time
- Update appointment with add-on items
- View carrier details and add more carrier terminals
- Print and/or email appointment details

Suppliers have access to appointment requests that identify the respective supplier in the request header. They can do the following tasks:

- Create appointment requests with shipment information
- Create appointment requests against standing appointments
- Submit appointment requests to Coordinators for approval
- View appointment progress without access to door assignment and additional order information
- Add comments when necessary throughout the appointment process
- Cancel appointment requests
- Request a different appointment date and time
- Update appointment with add-on items
- Print and/or email appointment details

Creating an Appointment Request

To create an appointment request, from the main menu, select **Dock Appointments > Create Appointment Request**, or click the **Create Appointment Request** button on the dashboard. The **Create Appointment Request** page is displayed. The layout and data entry process depends on the template in use and the global settings applied to the page.

Template-C Process

Track as hot appointment
 Yard Drop
 Use standing appointment

Requested Date/Time:

Trailer #: Select Equipment Type...

Estimated Unload Time:

Carrier:

Routing #:

Contact: emo, Phone: emo

Supplier:

Driver:

Preferred Carrier:

If load was brokered to you by a preferred carrier or you are a supplier tendering load to a preferred carrier - select carrier name in drop down box above

| I | O | N | D | Hot | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | Items | Type |
|---|---|---|---|-----|------|-------|---------------|----------|-----|------------|---------------|-------|---------|-------|------|
| | | | | | | | | | | | | | | | PLT |

PO #: Hot Item Pro #: FLR PLT

Supplier Name:

Quantity:

Cases
Pallets
Cases Ordered
Item Count

Comments:

Event Code: STA:

First compliant request date: Last compl. request dt: Last compl. request dt:

| STA COLOR LEGEND | | | | | |
|------------------|-----------|---------------------------------|------|---|----------|
| Rejected | Exception | On Time | Late | Exception | Rejected |
| Timeline: | -99 Days | Ontime is between STA-4 and STA | Late | Late or Exception is anything after STA | +99 Days |

| VALIDATION CODES | |
|--|---|
| * GOOD: PO # is valid | 0 |
| *X WARNING: PO # is cancelled | 0 |
| *C WARNING: PO # is closed | 0 |
| *D WARNING: PO # is deleted | 0 |
| % WARNING: PO is scheduled for another DC | 0 |
| ? WARNING: Cases entered is greater than cases ordered | 0 |
| !!! WARNING: PO # not found in system | 0 |

Ship To:

Address: blue street, Invisible, TX 00000, US
 Coordinators: Coordinator A, Coordinator B, Phone: +1 222-333-4444
[Click here to view facility information.](#)

Instructions:

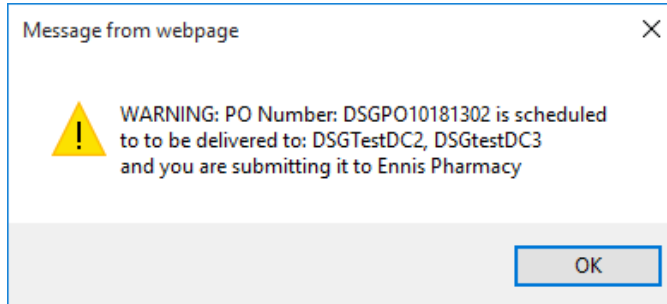
| Comment | COMMENT SAVED BY |
|---------|------------------|
| | |

Private:

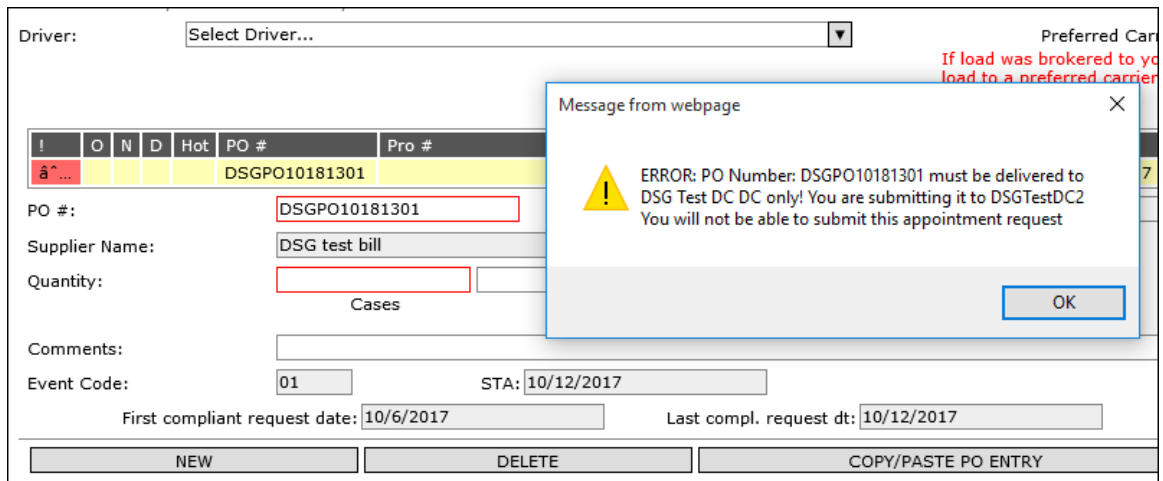
After saving this form,

- 1 To mark the appointment as "Hot", indicating an important or high priority item, select **Track as Hot Appointment**. For more information regarding Hot Appointment functionality, see [Configuration and Display of Hot Appointments](#).
- 2 To use a standing appointment request, select **Use Standing Appointment**.
 - ➡ **Note**— This should be used if you know that this supplier already has a reserved appointment.
- 3 In the **Ship To** dropdown, select the ship to DC or type in a ship to DC.
- 4 Enter the Trailer #, Routing # (if available), Carrier and Supplier (if they are different from what is currently displayed).
- 5 Enter the PO# and Quantity. The supplier name will be pre-filled by the system once the PO# is validated. Validation is performed as follows:
 - When users add a PO to an appointment request, the system compares the PO's destination DC to the DC selected in the appointment request.
 - If the destinations match, validation is completed and the PO is added.

- If the destinations do not match, the system will check if the PO's destination DC is marked as an "exclusive destination":
 - If the PO's destination DC *is not* an "exclusive destination", the system will return the following warning message as in previous versions. Users can continue to edit the appointment request, but will continue to receive warning messages each time such a PO is added.



- If the PO's destination DC *is* an "exclusive destination", the system will return the following warning message: "The PO [PO Number] must be delivered to EXCLUSIVE DC [DC name]. You will not be able to submit this appointment request to DC [DC name]." Users can continue to edit the appointment request, but will continue to receive warning messages each time such a PO is added.



- When users attempt to submit or update an appointment request with POs scheduled for an "exclusive destination" DC other than the DC selected in the appointment, the system will prevent the submission or update and display the following error message: "These PO(s): [PO Numbers] cannot be delivered to [DC name]".
- If PO# is not found in the system, three exclamation marks are shown to the left of the PO#.

- For more information on “exclusive destination” DCs, please see the *Managing Exclusive Destination DCs (Template-C)* section.
- 6 Click **New** to add additional PO #'s. Click the **Hot Item** checkbox to mark a PO as “Hot”. For more information regarding Hot Appointment functionality, see *Configuration and Display of Hot Appointments*.
- Or,
- a Click **Copy/Paste PO Entry**. The **Copy/Paste PO Entry** page displays.

Validation Codes Table:

| Code | Description | Count |
|------|--|-------|
| * | GOOD: PO # is valid | 0 |
| *X | WARNING: PO # is cancelled | 0 |
| *C | WARNING: PO # is closed | 0 |
| *D | WARNING: PO # is deleted | 0 |
| % | WARNING: PO is scheduled for another DC | 0 |
| ? | WARNING: Cases entered is greater than cases ordered | 0 |
| !!! | WARNING: PO # not found in system | 0 |

Main Data Table Headers:

| ! | O | N | D | Hot | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | Type |
|---|---|---|---|-----|------|-------|---------------|----------|-----|------------|---------------|-------|---------|------|
|---|---|---|---|-----|------|-------|---------------|----------|-----|------------|---------------|-------|---------|------|

- b Type or cut and paste each desired PO number on a new line or in a comma-delimited list in the Candidate POs text box and click **Validate**. To remove all entries from the text box, click **Clear**. Click the **Hot Item** checkbox to mark a PO as “Hot”.
- ➡ **Note**— You can also enter associated NumCasesShipped, ItemQty, ProbillNumber and FLR values. These values must be TAB- or space-separated and entered in the correct order to be validated properly. This process is described in detail in the *Entering Additional Values on 'Copy/Paste PO Entry' Page* section below.

The system reviews the entries and lists them in the PO form under the Candidate POs text box, complete with any available information and a validation code, which can be interpreted by referencing the Validation Codes legend.

- ➔ **Note**— Users can limit the number of POs that can be validated by selecting **Setup > Global Settings** and entering the desired maximum in the Maximum PO Limit Per Appointment field.

| VALIDATION CODES | | |
|------------------|--|---|
| * | GOOD: PO # is valid | 0 |
| *X | WARNING: PO # is cancelled | 0 |
| *C | WARNING: PO # is closed | 0 |
| *D | WARNING: PO # is deleted | 0 |
| % | WARNING: PO is scheduled for another DC | 0 |
| ? | WARNING: Cases entered is greater than cases ordered | 0 |
| !!! | WARNING: PO # not found in system | 0 |

- c Click on an entry in the PO table to enter any further details in the provided fields. Click **Delete** to remove the selected PO from the form.
- d When all desired POs have been entered, validated and entered, click **Save** to save the information and return to the **Appointment Details** or **Create Appointment Request** page. Click the **Clear All** button to remove all POs from the **Copy/Paste PO Entry** page.

Once the POs are inputted, the system calculates PO date tolerances per DC or supplier via set PO tolerances and graphically indicates whether or not the orders fall within the specified tolerance levels.

- 7 Once the PO lines have been entered, set the Requested Date either manually or by clicking **Suggest** to have the system suggest a delivery date to the user for a given appointment. Given sufficient data, the system will update the field with a "best fit" delivery date. Best fit is defined by the following logic (colors listed below are default settings; status colors can be customized):
 - Number of "Red" STA stasused PO lines is lowest possible (see below)
 - Among all potential delivery dates when the number of "Red" STA stasused POs are the same, the date with the highest number of "Green" stasused PO lines is chosen
 - If there are several potential delivery dates where the number of "Red" stasused and "Green" stasused POs lines are the same, then number of "Orange" stasused PO lines is used as a tiebreaker – the date with lowest number of "Orange" stasused PO lines is chosen (same as max number of "Yellow" stasused)

If there are several potential delivery dates when all STA color status counts are equal, the earliest is chosen.

| I | O | N | D | PO # | Supplier Name | Comments | Event Code | STA | Cases Ordered | Cases | Pallets | Type |
|----|---|---|---|---------|---------------|----------|------------|------------|---------------|-------|---------|------|
| MC | | | | 7884565 | | | 04 | 12/23/2011 | 89 | | | PLT |

PO #:

Supplier Name:

Quantity: Cases Pallets Cases Ordered

When the Requested Date is selected in the header, the STA field in the PO list will reflect delivery date statuses by configurable color coding. Both PO tolerance levels are set to 99 days for all distribution centers. STA column values in the PO line items table are highlighted according to the following rules:

- The STA value will be highlighted in green if the appointment requested date is within the First Receipt date range (PO STA date minus 4 days). In this case, the tooltip will read: "Accepted"
- The STA value will be highlighted in orange if the appointment requested date is within 103 days (99 days plus four days) before and 99 days after the First Receipt range. In this case, the tooltip will read either "WARNING - trying to deliver too late. Last possible delivery date is %1" or "WARNING - trying to deliver too early. First possible delivery date is %1" where the "%1" will be replaced with the closest valid STA date value (i.e. "STA date minus 4" for early deliveries and "STA" date for late deliveries)
- The STA value will be highlighted in red if the appointment requested date is 104 or more days before the purchase order's STA date or 100 or more days after the purchase order's STA date. In this case, the tooltip will read either "WARNING - Trying to deliver way too early!" or "WARNING - Trying to deliver way too late!"

A legend is provided on the appointment form for easy reference.


- 8 In the **Comment** box, displayed on the right-hand vertical pane of the page, enter any additional comments. Click **New** to detail additional separate comments and, to remove comments in the table, select the comment you wish to remove and click **Delete**. If the comments are private, select the **Private** check box.
- 9 Select one of the following:
 - **Save Draft:** saves a draft of the appointment request
 - **Approve:** (DA Admin users only) submits and approves the appointment request
 - **Submit:** submits the appointment request for approval
 - **Cancel:** cancels the appointment request

Entering Additional Values on 'Copy/Paste PO Entry' Page

When entering multiple purchase orders for an appointment via the **Copy/Paste PO Entry** page, users can copy and paste the following values along with purchase order (PO) numbers. This functionality will allow carriers to paste PO totals when submitting an appointment from a spreadsheet.

- **NumCasesShipped:** Number of cases delivered
- **ItemQty:** Number of pallets delivered
- **ProbillNumber**
- **FLR:** Enter "true" or "1" for FLR and "false" or "0" for PLT

These values must be TAB- or space-separated and entered in the correct order to be validated properly as shown in the following table and image. Each PO must be entered on a separate line or separated by a comma. When pasting PO values in the **Copy/Paste PO Entry** page copied from a spreadsheet, the system automatically formats these values in this way.

 **Note**— Use tab to designate empty fields. Spaces between values are combined and treated as a single separator and cannot be used to indicate an empty value.

| PONumber | NumCasesShipped | ItemQty | ProNumber | FLR |
|---------------|-----------------|---------|-----------|-------|
| DSGPO10171301 | 382 | 7 | PRO1 | true |
| DSGPO10181302 | 108 | | PRO2 | false |
| DSGPO10221301 | | 15 | PRO3 | true |
| DSGPO11051302 | 52 | 6 | PRO4 | |

Dock Appointments / Create Appointment Request / Copy/Paste PO Entry

SAVE
CLEAR ALL

Candidate POs

| | | | | |
|------------------------|-----|----|------|-------|
| DSGPO10171301 | 382 | 7 | PRO1 | true |
| DSGPO10181302 | 108 | | PRO2 | false |
| DSGPO10221301 | | 15 | PRO3 | true |
| DSGPO11051302_12345678 | 52 | 6 | PRO4 | |

Codes

| VALIDATION CODES | |
|--|---|
| * GOOD: PO # is valid | 0 |
| *X WARNING: PO # is cancelled | 0 |
| *C WARNING: PO # is closed | 0 |
| *D WARNING: PO # is deleted | 0 |
| ? WARNING: Cases entered is greater than cases ordered | 0 |
| % WARNING: PO is scheduled for another DC | 0 |
| Ø ERROR: PO cannot be delivered to this DC | 0 |
| !!! WARNING: PO # not found in system | 0 |

CLEAR VALIDATE
Keep Original Order
Order By Error Code

| I | O | N | D | Hot | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | Items | Type |
|-----|---|---|---|-----|------|-------|---------------|----------|-----|------------|---------------|-------|---------|-------|------|
| PLT | | | | | | | | | | | | | | | |

PO #: Hot Item Pro #: FLR PLT

Supplier Name:

Quantity:

Cases (Verify & change if needed) Pallets Cases Ordered Item Count

Comments:

Event Code: STA:

First compliant request date: Last compl. request dt: Last compl. request dt:

DELETE

Once all values are entered, click **Validate**. The POs are added with the specified additional values. Note that the fields left blank for DSGPO10181302, DSGPO10221301 and DSGPO11051302 are not populated with a value.

➡ **Note**— If the recordset returned by PO validation contains any of the specified fields, then the data from the returned recordset will be used instead of values pasted in the Candidate PO field.

Dock Appointments / Create Appointment Request / Copy/Paste PO Entry

SAVE
CLEAR ALL

Candidate POs

| | | | | |
|------------------------|-----|---|------|-------|
| DSGPO10171301 | 382 | 7 | PRO1 | true |
| DSGPO10181302 | 108 | | PRO2 | false |
| DSGPO10221301 | 15 | | PRO3 | true |
| DSGPO11051302_12345678 | 52 | 6 | PRO4 | |

Codes

| VALIDATION CODES | | |
|--|--|---|
| * GOOD: PO # is valid | | 0 |
| *X WARNING: PO # is cancelled | | 1 |
| *C WARNING: PO # is closed | | 1 |
| *D WARNING: PO # is deleted | | 1 |
| ? WARNING: Cases entered is greater than cases ordered | | 1 |
| % WARNING: PO is scheduled for another DC | | 0 |
| Ø ERROR: PO cannot be delivered to this DC | | 0 |
| !!! WARNING: PO # not found in system | | 0 |

CLEAR VALIDATE
Keep Original Order
Order By Error Code

| I | O | N | D | Hot | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | Items | Type |
|----|---|---|---|-----|------------------------|-------|---------------|----------|-----------|------------|---------------|-------|---------|-------|------|
| *X | | | | | DSGPO10171301 | PRO1 | DSG test bill | | 2/23/2018 | 01 | 8 | 382 | 7 | 10 | FLR |
| *C | | | | | DSGPO10181302 | PRO2 | DSG test bill | | 2/16/2018 | 01 | 8 | 108 | | 10 | PLT |
| *D | | | | | DSGPO10221301 | PRO3 | DSG test bill | | 2/22/2018 | 01 | 8 | | 15 | 10 | FLR |
| ? | | | | | DSGPO11051302_12345678 | PRO4 | DSG test bill | | 6/2/2018 | 01 | 8 | 52 | 6 | 10 | PLT |

PO #: Hot Item Pro #: FLR PLT

Supplier Name:

Quantity:

Cases (Verify & change if needed) Pallets Cases Ordered Item Count

Comments:

Event Code: STA:

First compliant request date: Last compl. request dt: Last compl. request dt:

Template-M Process

➡ **Note**— Depending on the client's configuration, certain fields may be required or read-only depending on the POs entered for the appointment request. For more information, please see [Text-Keys Related to PO Validation Codes](#).

Dock Appointments / Create Appointment Request
Create Appointment Request

SAVE DRAFT APPROVE SUBMIT CANCEL

Use standing appointment
 Standard appointment

Appointment Date:

Dock Number:

Track as hot appointment
 Multiple suppliers

Carrier: Supplier:

Requested Date: Unload Method:

Trailer Regn. #: Intl. Container #:

Additional Note: Product Type:

Cartons: Pallets: GOH: Bulky:

Ship To:

| Comment | Saved By |
|---------|----------|
| | |

Private:

NEW DELETE

| Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Cartons | GOH | Bulky | Order Type | Class Group | EQ Order Type | Ad Date |
|-----|----------------|----------------|------------|---------------|----------|---------|-----|-------|------------|-------------|---------------|---------|
| | Not in List... | Not in List... | | | | | | | | | | |

PO #:
 ASN #:
 Supplier Name: Class Group:
 Order Type: EQ Order Type:
 SSCC Qty: Cartons GOH Bulky Hot Item Ad Date:

Comments:

NEW DELETE MULTIPLE PO ENTRY

| VALIDATION CODES | |
|------------------|---|
| * | GOOD: PO # is valid |
| ** | NOTE: Multiple ASNs for current Ship To |
| !!! | WARNING: PO # not found in system |
| +++ | WARNING: Supplier does not exist |
| \$\$\$ | WARNING: Supplier not serviced by carrier |
| ### | WARNING: No ASN # for current Ship To |
| /// | WARNING: ASN # booked previously |
| AAA | WARNING: Duplicate PO# on booking |

- 1 To track the appointment and all associated line items, select **Track as Hot Appointment**. This marks the appointment with a status of "Hot", indicating an important or high priority appointment.
- 2 To use a standing appointment request, select the **Use standing appointment** radio button.
 - ➡ **Note**— This should be used if you know that this supplier already has a reserved appointment.
- 3 Select a Carrier from the **Carrier** dropdown.
- 4 Select a supplier from the **Supplier** dropdown. Select the **Multiple Suppliers** checkbox to enable the **Supplier** dropdown field on the purchase order form, where suppliers can be selected per line item. The **Supplier** dropdown is prepopulated with selections based on the carrier selected.
- 5 From the **Ship To** dropdown, select a distribution center. The **Ship To** menu is populated based on the selected carrier and supplier.
- 6 Enter the Trailer Regn. #.

- 7 Enter a purchase order manually or select a purchase order from the **PO #** or **ASN #** dropdowns. All related fields populate automatically based on the selection. The ASN# field can be hidden by enabling the **Disable PO Selection by ASN/Probill** global setting.

➡ **Note**— For Template-M, implementation specialists can have the system return the BOLNumber value as a non-empty string in the SELECT1 profile item when the **Disable PO selection by ASN/Probill** global setting is enabled. This feature is intended to ease the application configuration process when global settings are not entirely in sync with the profile items.

When users manually enter a PO or ASN number, the system will attempt to find a matching entry in the corresponding dropdown lists first and then provide the user with an option to use the matching list entry instead.

If the manually entered PO or ASN number matches a single entry, the following dialog is returned. Click **OK** to have the system populate the PO row with data from the matching entry.

| I | Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Loose Cartons | GOH | Bulky | Order Type | Class Group | EQ Order T |
|---|-----|-----------------|------------------|------------|-----------------|----------|---------------|-----|-------|------------|-------------|------------|
| * | | TEST_PO_3013693 | TEST_BOL_3013693 | TEST1 | TEST SUPPLIER 1 | | 0 | 0 | 100 | BOL_UDF8 | 2 | BOL_UDF7 |

PO #:

ASN #:

Supplier Name:

Order Type:

SSCC Qty:

Loose Cartons:

Comments:

Class Group:

Order Type:

End Date:

Message from webpage

?

Matching entry has been found in the corresponded dropdown list. Do you want to select it?

OK Cancel

NEW
DELETE
MULTIPLE PO ENTRY

If multiple matching entries are found, e.g. a single PO is listed multiple times in the dropdown list because it has different ASNs for each line, a different dialog is displayed: "Multiple entries have been found in the corresponded dropdown list. Do you want to select the first one?" Click **OK** to have the system populate the PO row with data from the first matching entry. If you click **Cancel**, the entered PO will be treated as "Not Found".

8 Click **New** to add additional PO #'s.

Or,

- a Click **Multiple PO Entry**. The **Multiple PO Entry** page displays. This feature can be disabled by enabling the **Disable Multiple PO Entry** global setting.

- b Type or cut and paste each desired PO number on a new line or in a comma-delimited list in the Candidate POs text box and click **Validate**. To remove all entries from the text box, click **Clear**.

The system reviews the entries and lists them in the PO form under the Candidate POs text box, complete with any available information and a validation code, which can be interpreted by referencing the Validation Codes legend. The legend is configurable and may appear differently for each client depending on the applied settings.

- **Note**— Users can limit the number of POs that can be validated by selecting **Setup > Global Settings** and entering the desired maximum in the Maximum PO Limit Per Appointment field.

| VALIDATION CODES | |
|------------------|---|
| * | GOOD: PO # is valid |
| ** | NOTE: Multiple ASNs for current Ship To |
| !!! | WARNING: PO # not found in system |
| +++ | WARNING: Supplier does not exist |
| \$\$\$ | WARNING: Supplier not serviced by carrier |
| ### | WARNING: No ASN # for current Ship To |
| /// | WARNING: ASN # booked previously |
| ^^^ | WARNING: Duplicate PO# on booking |
| x | Quantity is over the remaining PO units |

- c Click on an entry in the PO table to enter any further details in the provided fields. Click **Delete** to remove the selected PO from the form.
- d When all desired POs have been entered, validated and entered, click **Save** to save the information and return to the **Appointment Details** or **Create Appointment Request** page. Click the **Clear All** button to remove all POs from the **Multiple PO Entry** page.

If the **Validate Appointment Date Against POs Delivery Date** global setting is enabled, the selected Requested Date for the appointment is validated against the PO Delivery Date. Validity is determined using time tolerances set during the distribution center setup and is indicated according to customized colors for valid or invalid dates. The PO Delivery Date tooltip will inform the user of the earliest or latest delivery date that can be requested for the purchase order.

- 9 Click the **Hot Item** checkbox to apply "hot" or important status to individual purchase orders. This checkbox will be selected automatically if the purchase order data is already marked as "hot" in Descartes Visibility and Event Management.
- 10 Use the editable fields for Cartons, Pallets, GOH and Bulky in the header to override the prepopulated packaging values from the purchase order list if necessary. In certain configurations, the override fields are disabled and will not be available for use.
- 11 In the **Comment** box, displayed on the right-hand vertical pane of the page, enter any additional comments. Click **New** to detail additional separate comments and, to remove comments in the table, select the comment you wish to remove and click **Delete**. If the comments are private, select the **Private** check box.
- 12 Select one of the following:
 - **Save Draft:** saves a draft of the appointment request
 - **Approve:** (DA Admin users only) submits and approves the appointment request
 - **Submit:** submits the appointment request for approval
 - **Cancel:** cancels the appointment request

Template-W Process

Dock Appointments / Create Appointment Request [Icons]

Create Appointment Request

Track as hot appointment
 Yard Drop
 Use standing appointment

Requested Date/Time:
 Mode: TL LTL

Carrier: TEST CARRIER& (1TCA) - 1TCA
 Supplier:

Trailer #:
 Routing #:

Quantity:
 Cartons
 Pallets
 Loose
 GOH
 Units Shipped
 Weight
 Cube (M)
 Cube (L)

| I | N | D | PO # | FOB | Cartons | Ladder Plan | Dept# | Units | Start Ship | Cancel At | Hot Deal | AD | PrePack | PreTicket | Store Ready |
|------------------|---|---|------|-----|---------|-------------|-------|-------|------------|-----------|----------|----|---------|-----------|-------------|
| < [Navigation] > | | | | | | | | | | | | | | | |

Manugistics #

PO #: X
 FOB:

AD
 PrePack
 Units
 PreTicket
 Store Ready

Ladder Plan
 Department#
 Hot Deal
 Start Ship Date
 Cancel at DC Date

Quantity:
 Cartons
 Pallets
 Loose
 GOH
 Units Shipped
 Weight
 Cube (M)
 Cube (L)

Supplier Name:

Comments:

| VALIDATION CODES | | |
|------------------|-----------------------------------|---|
| * | GOOD: PO # is valid | 0 |
| /// | WARNING: ASN # booked previously | 0 |
| !* | WARNING: PO details not available | 0 |
| ??? | WARNING: PO # not found in system | 0 |

Ship To: [Distribution Center]

Address:

Coordinators: Phone: Fax:

[Click here to view facility information.](#)

Instructions: The yard hours for pick up of empty trailers are Monday to Friday, 7:00 am - 12:00 midnight. For Inquiries, call [Phone Number]

| Comment | Saved By |
|------------------|----------|
| < [Navigation] > | |

Private:

After saving this form,

- 1 To track this appointment, select **Track as Hot Appointment**. This marks the appointment with a status of "Hot", indicating an important or high priority appointment. If the appointment is for a drop shipment, click the **Yard Drop** checkbox.
- 2 To use a standing appointment request, select **Use standing appointment**.
 - ➡ **Note**— This should be used if you know that the supplier already has a reserved appointment.
- 3 From the **Ship To** dropdown, select a distribution center.
- 4 Enter the Trailer #, Routing #, Carrier and Supplier (if they are different from what is currently displayed).

- 5 Enter the PO#, associated purchase order information, Quantity, Supplier Name and Comments.
 - 6 Click **New** to add additional PO #'s.
- Or,
- a Click **Multiple PO Entry**. The **Multiple PO Entry** page displays.

Multiple PO Entry

SAVE CLEAR ALL

Candidate POs

Codes

| VALIDATION CODES | | |
|------------------|-----------------------------------|---|
| * | GOOD: PO # is valid | 0 |
| /// | WARNING: ASN # booked previously | 0 |
| !* | WARNING: PO details not available | 0 |
| ??? | WARNING: PO # not found in system | 0 |

CLEAR VALIDATE

| I | N | D | PO # | FOB | Cartons | Ladder Plan | Dept# | Units | Start Ship | Cancel At | Hot Deal | AD | PrePack | PreTicket | Store Ready |
|---|---|---|------|-----|---------|-------------|-------|-------|------------|-----------|----------|----|---------|-----------|-------------|
| | | | | | | | | | | | | | | | |

Manugistics #

PO #: FOB:

AD PrePack Units PreTicket Store Ready

Ladder Plan Department# Hot Deal Start Ship Date Cancel at DC Date

Quantity:

Cartons Pallets Loose GOH Units Shipped Weight Cube (M) Cube (L)

Supplier Name:

Comments:

DELETE

- b Type or cut and paste each desired PO number on a new line or in a comma-delimited list in the Candidate POs text box and click **Validate**. To remove all entries from the text box, click **Clear**.

The system reviews the entries and lists them in the PO form under the Candidate POs text box, complete with any available information and a

validation code, which can be interpreted by referencing the Validation Codes legend.

| VALIDATION CODES | |
|---------------------------------------|---|
| * GOOD: PO # is valid | 0 |
| /// WARNING: ASN # booked previously | 0 |
| !* WARNING: PO details not available | 0 |
| ??? WARNING: PO # not found in system | 0 |

- Note**— Users can limit the number of POs that can be validated by selecting **Setup > Global Settings** and entering the desired maximum in the Maximum PO Limit Per Appointment field.
 - c Click on an entry in the PO table to enter any further details in the provided fields. Click **Delete** to remove the selected PO from the form.
 - d When all desired POs have been entered, validated and entered, click **Save** to save the information and return to the **Appointment Details** or **Create Appointment Request** page. Click the **Clear All** button to remove all POs from the **Multiple PO Entry** page.
- 7 Use the editable Quantity fields in the header to override prepopulated quantity values from added line items.

| | | | | | | | | |
|------------|---|------------|----------------------|-----|---------------|--------|----------|----------|
| Carrier: | TEST CARRIER& (1TCA) - 1TCA ▼ | Supplier: | ▼ | | | | | |
| Trailer #: | <input type="text"/> | Routing #: | <input type="text"/> | | | | | |
| Quantity: | <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0.00"/> <input type="text" value="0.00"/> | | | | | | | |
| | Cartons | Pallets | Loose | GOH | Units Shipped | Weight | Cube (M) | Cube (I) |

- 8 In the **Comment** box, displayed on the right-hand vertical pane of the page, enter any additional comments. Click **New** to detail additional separate comments and, to remove comments in the table, select the comment you wish to remove and click **Delete**. If the comments are private, select the **Private** check box.
- 9 Select one of the following:

 - **Save Draft:** saves a draft of the appointment request
 - **Approve:** (DA Admin users only) submits and approves the appointment request
 - **Submit:** submits the appointment request for approval
 - **Cancel:** cancels the appointment request

The system validates certain fields on the **Create Appointment Request** and **Appointment Details** pages for Template-W to prevent the entry of invalid quantity values for an appointment. These fields and their accepted values are listed below.

Header Level fields:

- **Cartons:** Accepts non-negative floating point values

- **Pallets:** Accepts non-negative floating point values
- **Loose:** Accepts non-negative integer values
- **GOH:** Accepts non-negative floating point values
- **Units Shipped:** Accepts non-negative integer values
- **Weight:** Accepts non-negative floating point values
- **Cube(M):** Accepts non-negative floating point values
- **Cube(I):** Accepts non-negative floating point values

Line Level Fields:

- **Cartons:** Accepts non-negative floating point values
- **Pallets:** Accepts non-negative floating point values
- **Loose:** Accepts non-negative integer values
- **GOH:** Accepts non-negative floating point values
- **Units Shipped:** Accepts non-negative integer values
- **Weight:** Accepts non-negative floating point values
- **Cube(M):** Accepts non-negative floating point values
- **Cube(I):** Accepts non-negative floating point values

Using the Advanced PO Search

- **Note**— This feature is specific to certain customers. If it is not requested specifically by the customer, this feature will not be found in the form.

To perform an Advanced PO Search:

- 1 Click the **Advanced PO Search** button on the **Appointment Advice** or **Appointment Details** page to display the **Advanced PO Search** page.

Dock Appointments / Create Appointment Request / Advanced PO Search Page
Advanced PO Search Page

SAVE CANCEL

Search POs for **Codes**

Requested Date: Supplier: Ship To: North Augusta

Search PO By: STA Date Range Validation Code

PO STA date from and day(s) around Requested Date SEARCH CLEAR RESULTS

| ! | O | N | D | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Case s | Pallets | Type |
|--|---|---|---|------|-------|---------------|----------|-----|------------|---------------|--------|---------|------|
| PO #: <input type="text"/> Pro #: <input type="text"/> <input type="radio"/> FLR <input type="radio"/> PLT Supplier Name: <input type="text"/> Quantity: <input type="text"/> Cases (Verify & change if needed) Pallets Cases Ordered Comments: <input type="text"/> Event Code: <input type="text"/> Event Code: <input type="text"/> STA: <input type="text"/> First Receipt: <input type="text"/> Last Receipt: <input type="text"/> Last Bill: <input type="text"/> DELETE | | | | | | | | | | | | | |

| STA COLOR LEGEND | | | | | | |
|-------------------|---------------|--------------|-----------|-----------|----------|--|
| Rejected | Exception | On Time | Late | Exception | Rejected | |
| Timeline: -T Days | First Receipt | Last Receipt | Last Bill | +T Days | | |

- 2 Enter the Requested Date and select a supplier from the **Supplier** dropdown. If searching by **STA Date Range**, using the **PO STA Date** menus, specify up to two weeks before or after the requested date and click **Search**.

Search PO By: STA Date Range Validation Code

For the requested day POs STA is SEARCH CLEAR RESULTS

Select STA Validation code

- Accepted (Green)
- Accepted (Green)
- Accepted or before Last Bill Date (Green, Yellow, Orange)
- Accepted as an Exception (Green, Yellow, Orange)

| ! | O | N | D | PO # | Supplier Name | Comments |
|--------------------------|---|---|---|------|---------------|----------|
| [Table content obscured] | | | | | | |

- 3 If searching by **Validation Code**, select a code from the dropdown and click **Search**.
- 4 After the POs appear in the list, use the **Delete** button to remove the unwanted POs.

Updating an Appointment Request

Note— An appointment can be updated up until it is checked in.

To update an appointment:

- 1 From the selected page, right-click on the desired appointment and select **Appointment Details**. The **Appointment Details** page is displayed.

- 2 Edit the appropriate fields.
 - **Note**— Carriers and Suppliers can update the Supplier, PO #, Pro #, Supplier Name, Quantity and Comments fields. If the PO# or Requested Date/Time field is updated, the **Update** button changes to **Re-Submit**.
 - **Note**— Clients using Template-C can click the **Change Qty** button in the PO entry section of the Appointment Details page to change the values of the Pallets Quantity and Cases Quantity fields.
- 3 Carriers and Suppliers can add a new PO to the appointment. The **Update** button changes to **Re-Submit** when a new PO is added.
- 4 Click the **Select Advices** button to add advices to the appointment. The **Select Advices/Search Advices** window appears.

Select an advice from the list on the **Select Advices** tab or search for specific advices from the **Search Advices** tab. Double-click the advice to add it to the appointment. To add multiple advices to the appointment, hold CTRL to select more than one row, then right-click and select **Add** from the right-click menu.

As with creating new appointments from advices, the Probill number of each advice is added as a PO line item on the appointment.

- **Note**— The advice feature is specific to certain customers. If it is not requested specifically by the customer, this feature will not be found in the form.

- 4 Click **Update** or **Re-Submit** depending on what changes were made to the appointment.

When the appointment is re-submitted, it goes back to the **Submitted Appointments** page for approval from the Coordinator again.

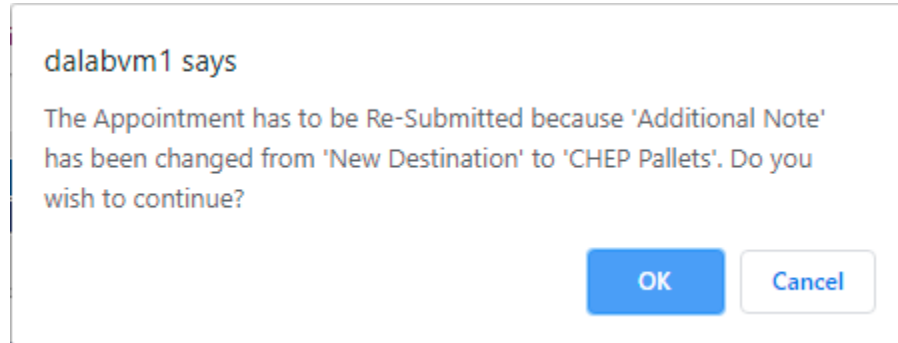
Updating Approved Appointment Requests

Template-C and Template-M of Descartes Dock Appointments Scheduling allow carrier and supplier users to update appointments in "Approved" status. No **Re-Submit** button is displayed for the carrier or supplier user when an approved appointment is open and is being modified. Instead of showing **Re-Submit** button, carrier and supplier users can click **Update** and the system will check for "critical" changes to the appointment. If the system detects that some critical changes were made, then it will warn the user that the appointment cannot be updated and must be re-submitted. Fields are configured as "critical" by the SecAdmin user via the new **ApptResubmitFields** system list. A full description of this configuration process is provided in [Appendix F: Configuring Approved Resubmission Functionality](#).

To provide an overview, the system does the following when the carrier or supplier attempts to update an approved appointment:

- When the carrier or supplier user makes a *non-critical change* to an approved appointment and clicks **Update**, the system displays a confirmation dialog with the following warning message: "You are updating an appointment. These changes will not resubmit an appointment for DC to review. If you feel the DC needs this information, please notify them directly using phone/email address under ship to area". Click **OK** to proceed with the update.

- When the carrier or supplier user makes a *critical change* to an approved appointment and clicks **Update**, the system displays a confirmation dialog with a warning message stating that the appointment must be resubmitted. Click **OK** to proceed with resubmission. Click **Cancel** to continue editing the appointment.



- If the system detects that the appointment was updated by other users while the current user was working on the same appointment, a warning message is displayed upon update stating that the appointment cannot be saved and must be reloaded before any further changes are made. The user then must reload the appointment to retrieve the latest version from the server.
 - Note**— In addition to the Update operation, which allows any DC user to update an appointment without resubmission, the Global DA Global Admin can also click **Re-Submit** to force a resubmission of the appointment. This allows the DA Admin to place the modified appointment into a DC's "Submitted" queue and lets the local DC users handle approval.

Template-C: "N" Column Functionality for DC Users

For DC users of Template-C, there is an "N" column in the PO lines table. For resubmitted appointments, the system will attempt to find the last pre-resubmitted version of the appointment in the database and compare the PO lines from this appointment to the new version according to the following rules:

- If the PO is not found in the last pre-resubmitted version of the appointment in the database, then the N column is populated with a value of "N" for a new PO on the new version of the appointment.
- If the PO is found in the last pre-resubmitted version of the appointment in the database but does not exist on the new version, a comment line is added to the appointment stating that the PO number has been removed.

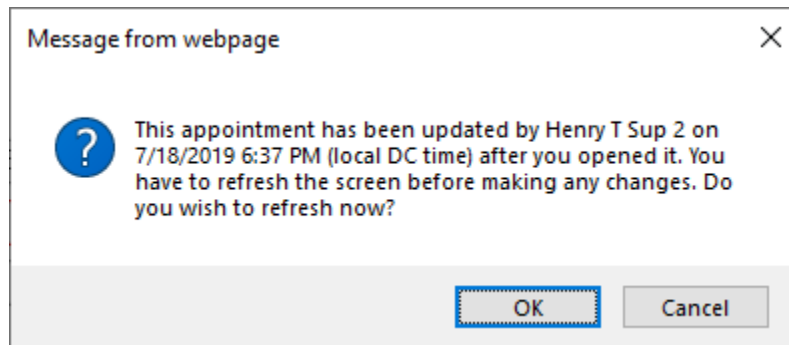
As a part of this feature, when any critical value (quantity, FLR/PLT, Number of Pallets, etc.) is changed for a PO, the N column will display a value of "C", so that DC users are better able to see significant changes and the reasons for these changes. Users can hover the mouse cursor over the "N" column value to display a tooltip describing the "N" or "C" value:

- **N:** "This appointment line has been added since this appointment was re-submitted"
- **C:** "This appointment line has been changed since this appointment was re-submitted"

Template-M: Appointment Merging During Concurrent Updates

For certain clients with daily deliveries to a distribution center, the carrier often requests an appointment in advance and creates placeholder appointment lines for known suppliers. Once the appointment is approved, the line-level suppliers are notified and can then update their appointment lines with details.

This workflow can result in multiple suppliers attempting to update the same appointment at the same time. In previous versions of Descartes Dock Appointments Scheduling, when a line-level supplier user modified an approved appointment and clicked **Update**, the system compared the version number of the appointment currently loaded in the user interface (Client Version) with the version number of the appointment in the database (Server Version). If the Client Version number was equal to the Server Version, the update proceeded. If the Client Version number was not equal to the Server Version, then another user had saved changes to the appointment and the following dialog was returned.



Once the user clicked **OK**, the page was refreshed with the latest Server Version and he or she had to reapply their changes. When several line-level suppliers attempted to make changes to their appointment lines at once, the process could be tedious, often resulting in multiple attempts to update the appointment line details.

To handle this scenario more effectively, DA Admin users can enable the **Enable Appointment Merge** setting on the **Global Settings** page for clients using Template-M. When enabled, the system attempts to merge a line-level supplier's changes in the Client Version of the appointment with the current Server Version upon clicking **Update**.

Appointment Merge Overview

This functionality works as follows:

- If the Client Version number does not equal the Server Version number, another user has updated the appointment since it was retrieved by the line-level supplier user. The system will then attempt to merge the supplier's changes with the latest Server Version after checking for the following conditions:
 - The **Enable Appointment Merge** setting is turned on.
 - If the user is NOT a line-level supplier, the appointment will not be merged.
 - If any appointment header level field has been modified by another user in the Server Version of the appointment, the appointment will not be merged.
 - If any appointment line belonging to the supplier was modified by another user in the Server Version of the appointment, the appointment will not be merged.
 - If the supplier has modified any appointment header level fields, the appointment will not be merged.
- If the Client Version of the appointment *cannot be merged* under any of these conditions, a dialog is returned to notify the supplier that the appointment was updated by another user and the local version must be reloaded with the latest version. Upon clicking **OK**, the page will be refreshed with the latest version from the server and any changes must be reapplied.
- If the Client Version of the appointment *can be merged* with the Server Version, the system does the following to create a merged version using the Server Version as a source:
 - Replaces all lines of the supplier with lines from the Client Version
 - Appends any comments added in the Client Version to existing comments in the Server Version

So, when the user clicks **Update**, the system then checks if the appointment must be merged and/or resubmitted (first roundtrip call to the server). The results are sent back to the user interface. There are three possible outcomes of this check:

- 1 If no resubmission is required and the appointment is either at the latest version OR could be merged with the latest version, then the system executes an appointment update immediately upon the second roundtrip call to the server (this occurs without input from the user).
- 2 If re-submission is required and the appointment is either at the latest version OR could be merged with the latest version, then a dialog is displayed as in previous versions, asking if the supplier wants to resubmit the appointment.
 - a If the supplier clicks **OK**, the system then executes an appointment update call (second roundtrip call to the server).

The screenshot shows a 'Cancel' dialog box with the following elements:

- Window title: Dock Appointments / Appointment Details - Request# 1762282 / Cancel
- Dialog title: Cancel
- Buttons: SAVE, CANCEL
- Reason Code: A dropdown menu.
- Comment: A text area with scroll arrows.

- 2 In the Reason Code field, select a reason for the cancellation.
- 3 In the Comment field, enter any comments.
- 4 Click **Save** to cancel the appointment or click **Cancel** to return to the appointment page.

Viewing Carrier Details

↻ **Note**— Suppliers cannot view carrier details.

To view a carrier's details:

- 1 From the main menu, select **Dock Appointments > Carrier Terminals**. The **Carriers** page/tab displays.
- 2 Right-click and select **Carrier Details** from the menu. The **Carrier Details** page is displayed.
- 3 Click **New** to add a new carrier terminal.
- 4 Click **Save** to save the new carrier terminal(s), or **Close** to return to the **Carriers** page without saving.

Working with Appointment Advices

The Appointment Advice feature, available for clients using Template-C, allows users to create multiple advices and assemble them into one appointment for submission.

To enable this feature, click the **Enable Appointment Advices** checkbox on the **Global Settings** page.

➔ **Note**— This feature is specific to certain customers. If it is not requested specifically by the customer, this feature will not be found in the form.

Summary

Approval #

APPOINTMENT COUNT 185863

Created (Draft): 27

Advices: 0

Processed Advices: 0

Submitted: 310

Refused/Cancelled: 14038

Approved: 6333

Arrived: 156

Departed: 161015

No Show: 3984

LEGEND

| | |
|-----------|-------------------|
| Created | Hot |
| Submitted | Re-Submitted |
| Standing | Approved |
| Refused | Cancelled |
| Arrived | Departed |
| No Show | Deleted |
| Advices | Processed Advices |
| Refused | Deleted |

DA Admin Inbox

Legend (Advices) : ■ Missing Probill # with No Pickup Date ■ Missing Probill # with Past Pickup Date

| Status | Reason Code | Last Modified On | DC | Probill | Comments | PO # | PO Count | Unload Time | Yard Drop |
|--------|-------------|---------------------|------------|---------|----------|---------|----------|-------------|-----------|
| | | 9/8/2011 9:54 PM | Chemung-NY | | | | 0 | 0 | False |
| | | 9/8/2011 9:56:42 PM | Chemung-NY | | | 6767777 | 1 | 1 | False |

As shown in the image above, the Dashboard includes selectable tabs, statistics, menu items and legend icons for advices.

Users can also perform searches on advices (draft, submitted or processed) and specify Advices in inbox and email preferences for notification.

To allow particular carrier users to combine Appointment Advices into a single appointment request, select the **Can combine appointment advices** checkbox on the **Carrier Details** page.

Carrier Details

Carrier Name: SCAC:

Notes:

Color Code:

auto-scheduling enabled

can combine appointment advices

To allow particular supplier users to create Appointment Advices, select the **Can Create Appointment Advices** checkbox on the **Supplier Details** page.

Supplier Details

Supplier Name: Supplier ID:

Deleted:

Notes:

Auto-scheduling Enabled

Can Create Appointment Advices

Creating an Appointment Advice

To create a new appointment advice:

- 1 From the main menu, select **Dock Appointments > Create Appointment Advice**. Or, click the **Create Appointment Advice** button on the Dashboard. The **Create Appointment Advice** page appears.

Dock Appointments / Create Appointment Advice

Create Appointment Advice

SAVE DRAFT SUBMIT CANCEL

Track as hot appointment

Requested Date/Time:

CVS Routing #:

Carrier: DSG Test Carrier (DSGT) - Test Supplier: DSG_Supplier (TEST) - Test

Address: CA Address: street_address, city_city, st

Contact: Phone: Contact: supplier_contact, Phone:

Service Level: Select Service Lev Pickup Date: -unknown- Pro #:

| I | O | N | D | Hot | PO # | Supplier Name | Comments | STA | Event Code | Cases Ordered | Cases | Pallets | |
|---|---|---|---|-----|------|---------------|----------|-----|------------|---------------|-------|---------|---|
| < | | | | | | | | | | | | | > |

PO #: Hot Item FLR PLT

Supplier Name:

Quantity: Cases Pallets Cases Ordered

Comments:

Event Code: STA:

First Receipt: Last Receipt: Last Bill:

STA COLOR LEGEND

| Rejected | Exception | On Time | Late | Exception | Rejected |
|--------------------|---------------|--------------|-----------|-----------|----------|
| Timeline: -10 Days | First Receipt | Last Receipt | Last Bill | +5 Days | |

VALIDATION CODES

| | |
|--|---|
| * GOOD: PO # is valid | 0 |
| *X WARNING: PO # is cancelled | 0 |
| *C WARNING: PO # is closed | 0 |
| *D WARNING: PO # is deleted | 0 |
| % WARNING: PO is scheduled for another DC | 0 |
| ? WARNING: Cases entered is greater than cases ordered | 0 |
| !!! WARNING: PO # not found in system | 0 |

Ship To: DSGtestDC

Address: Coordinators: coordinator 1, coordinator 2, Phone:

[Click here to view facility information.](#)

Instructions: *Please look at these instructions! They are very important! If you do not follow these instructions, your appointment will be cancelled!*

| Comment | COMMENT SAVED BY |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |

Private:

After saving this form,

- Enter all relevant information as with a regular appointment. If known, enter the Probill number field on header. When the advice is processed as an appointment request, this number is transferred to the line item PO number list. If the Probill number is unknown, leave this field empty; the Probill number field is the only editable field on an Appointment Advice after submission/processing.
- Click **Save Draft** to save the advice for edits later, or click **Submit** to submit the advice for processing.

Viewing Appointment Advices

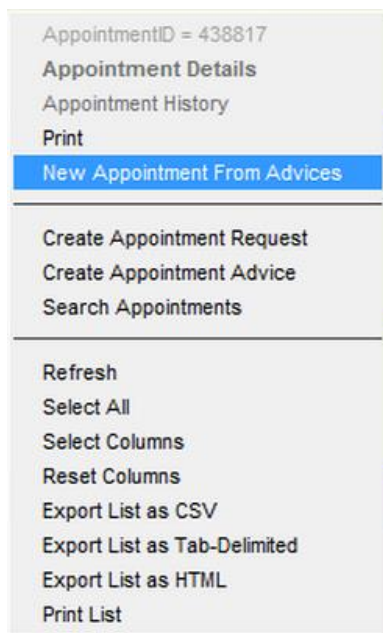
The **Appointment Advices** page lists all submitted advices, and **Processed Appointment Advices**, lists all processed advices in the system. These tabs are accessible via the main menu. Draft advices are viewable from the **Created (Draft) Appointments** tab along with all other draft appointments.

From the **Processed Advices** list, select the **Appointment Request Details** right-click option to display the details of the appointment that contains the advice.

Creating Appointments from Advices

From the **Appointment Advices** list page, users can select one or more submitted **Appointment Advices** of the same DC and carrier, right-click and select **New Appointment from Advice(s)** from the right-click menu.

➡ **Note**— When logged in as DC user, make sure all advices selected to be combined into a single appointment belong to the same carrier.

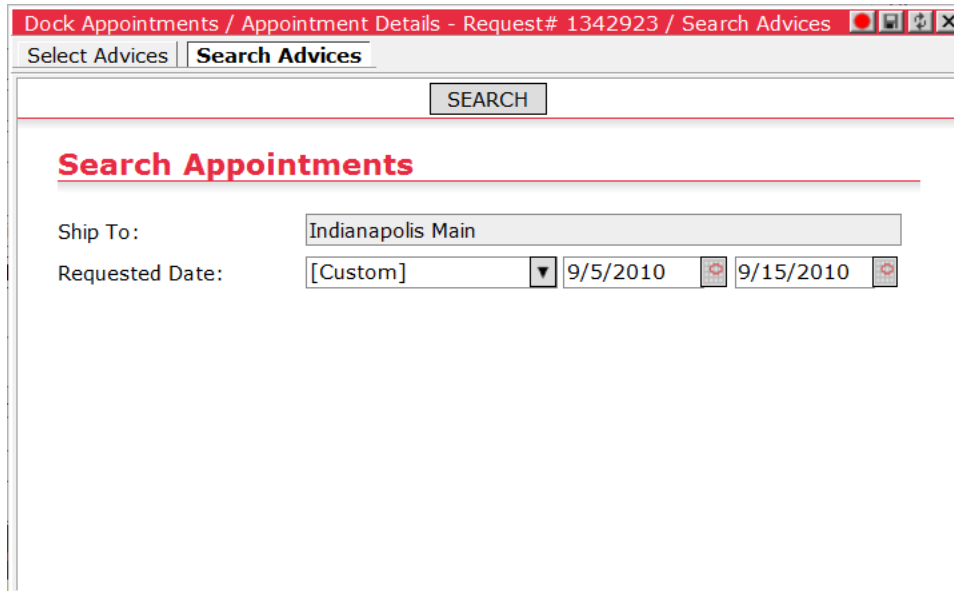


The advices are processed as one appointment request. The value entered into Probill number field is transferred to the line item PO number list on the new appointment request. On each line item PO, the read only field Originated from Advice Number displays the advice from which the line item was created.

➡ **Note**— Validation logic prevents incorrect combinations of DCs for advices.

Adding Appointment Advices to an Appointment

On the **Appointment Details** page of a submitted or approved appointment, click the **Select Advices** button to add advices to the appointment. The **Select Advices/Search Advices** window appears.



Select an advice from the list on the **Select Advices** tab or search for specific advices from the **Search Advices** tab. Double-click the advice to add it to the appointment. To add multiple advices to the appointment, hold CTRL to select more than one row, then right-click and select **Add** from the right-click menu.

As with creating new appointments from advices, the Probill number of each advice is added as a PO line item on the appointment.

Managing Users as a Party User Admin

When a carrier or supplier user is designated as a Party User Admin by the DC Admin, the user can add, edit or remove carrier or supplier users assigned to their party from the respective **Carrier Details** or **Supplier Details** page. For all other parties the Party User Admin has access to but is not an administrator of, users can only be viewed in read-only mode. In read-only mode, the **New**, **Delete** and **Edit User** buttons will not display and the dropdown list will appear as read-only to the Party Admin User.

For details on how DC Admin users designate party users as a Party User Admin, please see [Setting a Carrier or Supplier User as Party User Admin](#).

Adding a User

Party User Admins can create new user for their party. To create a new user, click the **New** button to create a new row in the Carrier/Supplier Details table and select the **Not in list...** option. The **Create User** page will appear, allowing the Party User Admin to create a new user with login credentials.

The screenshot shows a web browser window with the title 'Dock Appointments / Distribution Centers / Create User'. The page content is titled 'Create User' and features two columns of input fields. The left column, 'Dock Appointment User Information', contains fields for 'User Name', 'Title', and 'E-Mail Address'. The right column, 'Login Credentials', contains fields for 'Login Name', 'Password', 'Confirm Password', 'E-Mail Address for Resetting Password', 'Recovery Question', and 'Recovery Answer'. A checkbox labeled 'Change after login' is located between the 'Confirm Password' and 'E-Mail Address for Resetting Password' fields. At the top of the form area, there are 'SAVE' and 'CANCEL' buttons.

Once the new user is created, be sure to save the carrier or supplier. Otherwise, the new user will be created but will not be added to the party and the Party User Admin will not have access to it. In this case, the Party User Admin would have to contact the DA Admin or the DC Admin to add the user to the party.

Editing a User

To edit a user, select a user in the Carrier/Supplier Details table and click the **Edit User** button. The **Edit User** window will appear, allowing the Party User Admin to edit user information and login credentials.

Dock Appointment User Information

User Name: test x supplier 2

Title:

E-Mail Address: tsu2@dsg.com

Login Credentials

Login Name: tsu2

Reset Password:

Removing a User

To remove a user from the carrier or supplier, select a user in the Carrier/Supplier Details table and click the **Delete** button. The carrier or supplier user will be removed from the table. Once the user is removed, be sure to save the carrier or supplier.

Carrier Self-Registration Process

In previous versions, when a carrier was not set up in the system, DA Global Admin users had to gather all relevant information (Name, SCAC, address, contact information, etc.) and create a new party with one or more users. Only then could the carrier use the application to submit appointment requests or review and manage previously submitted appointments.

To streamline this process and reduce the workload for the DA Global Admin user, DC Admin and Coordinator users can register new carrier users in the system and provide the login information to them. The new carrier user themselves can then complete the registration process.

DA Global Admin users can enable this functionality from the **Global Settings** page.

The screenshot shows the 'Global Settings' window with the following configuration:

- Application Template: NO TEMPLATE SET (ReadOnly)
- Automatic Transitions: Off
- Deleted Age: (Empty)
- Checked-In Age: (Empty)
- Maximum PO limit per appointment: 99
- Number of Hours to Send a Reminder e-mail for Approved Appointments: 48
- Enable PartyRelationship logic:
- Display Quantities on Door Assignments:
- Enable Appointment Advices:
- Enable Carrier Self-Registration:**

When the DA Global Admin enables the **Allow Carrier Self-Registration** option on the **Global Setting** page, the system checks if the 'DA Unregistered Carrier (Model)' user group and the 'DA Unregistered Carrier' user role exist and then performs the following actions where appropriate.

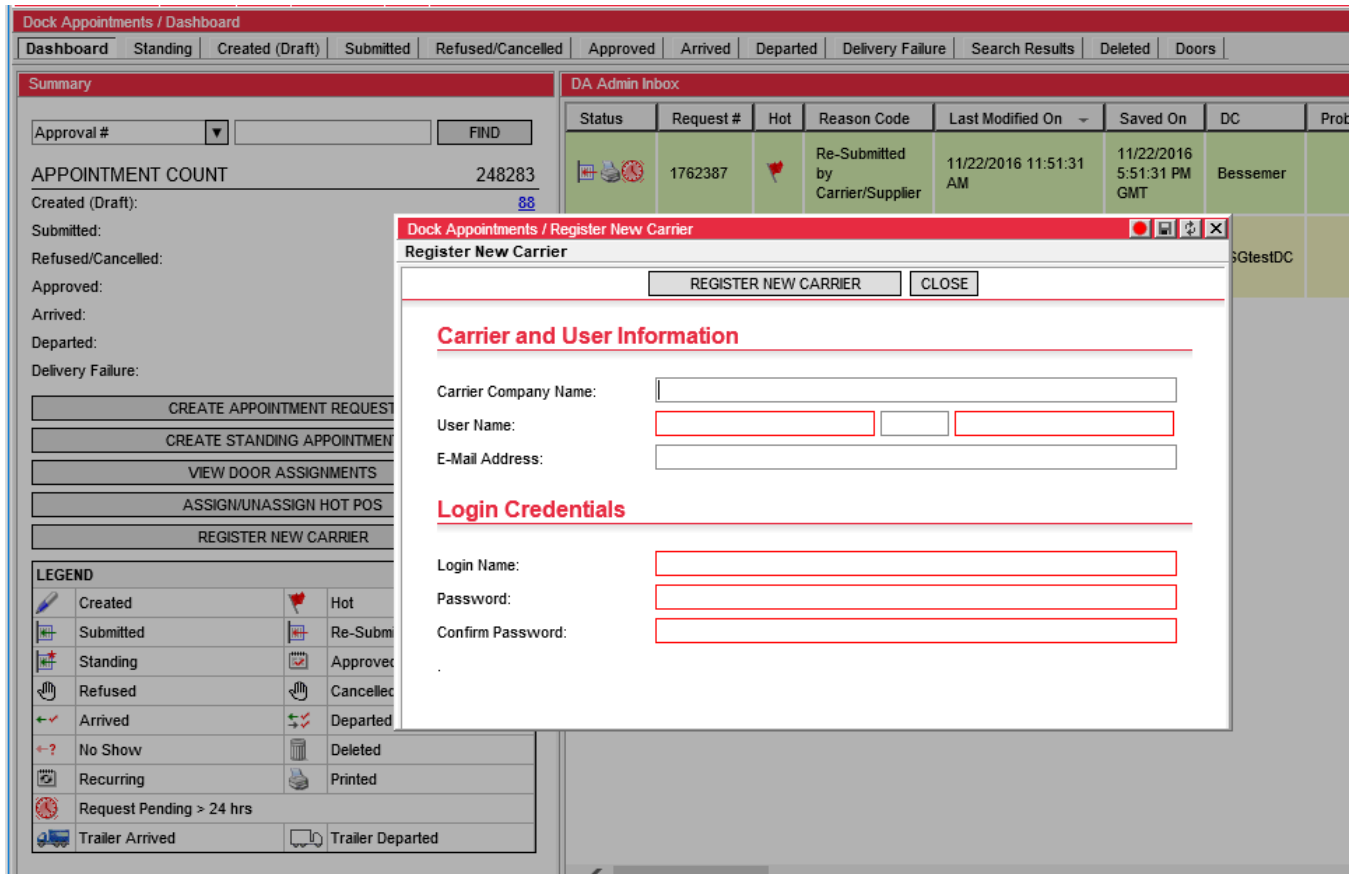
- The system will create the 'DA Unregistered Carrier (Model)' user group and 'DA Unregistered Carrier' role if they do not exist.
- The system will activate the 'DA Unregistered Carrier (Model)' user group if it already exists.

When the DA Global Admin disables the **Allow Carrier Self-Registration** option, the system will deactivate the 'DA Unregistered Carrier (Model)' user group.

Registering a New Carrier

When a new carrier contacts the distribution center to schedule a delivery, the DC Admin communicates with the carrier and determines if the contact is a legitimate carrier. If so, the DC Admin or Coordinator user can register a new carrier as follows:

- 1 Click the **Register New Carrier** button in the **Summary** pane of the Dashboard. The **Register New Carrier** window appears.



- 2 Using this form, DC Admin or Coordinator users can create a new carrier user with a password. Enter the Carrier Company Name, User Name, Email Address and Login Credentials. The User Name and Login Credentials fields are required. The carrier data entered in the **Register New Carrier** window is used to pre-populate the **Carrier Self Registration** page described in the following section.
- 3 Click **Register New Carrier**. A new user is created in the system with an "Unregistered Carrier" role assigned. With this role, the new carrier user will have access to the **Carrier Self Registration** page upon login. Once the new Carrier user is created, the DC Admin or Coordinator user can then share the login credentials with the carrier.

Carrier Self Registration

The carrier can log in to the system with the credentials provided by the DC Admin or Coordinator. Upon login, the **Carrier Self Registration** page appears, which must be completed before the new user is granted access to relevant areas of the application. The three Message from DC messages and the footer message are configurable. Clients can add any desired instructions or disclaimers or leave these messages blank.

Dock Appointments / Carrier Self-Registration
Carrier Self-Registration

Message from DC 1
Message from DC 2
Message from DC 3

Your Company Details

Your Company Name: SCAC:

Street Address:

City/State/Zip:

Country: ▼

Contact:

Phone: Fax:

Company Email Address:

Your Comment:

SUBMIT

Service provider is not responsible for, and expressly disclaims all liability for, damages of any kind arising out of use, reference to, or reliance on any information contained within the site

The Carrier Name, SCAC and Contact fields are required. The user can enter any comments to the administrators in the Your Comment text box. Click **Register** when all necessary information is entered.

- ➔ **Note**— The Street Address, City/State/Zip, Country, Contact, Phone, Fax and Email Address fields are “optionally required”. Admin users can configure these fields to be required on the form by editing the associated text-keys.

Once the self-registration is completed, the user is then given a set of roles appropriate for a Carrier user and the “Unregistered Carrier” role is removed from the user.

The Carrier user is then prompted to login again. Upon login, he or she will be able to submit appointment requests and access previously submitted appointments as with any other carrier user.

Identifying Self-Registered Carriers

When the carrier completes the self-registration process, the **Review Required** checkbox appears on the associated **Carrier Details** page. It is enabled by default for newly registered carriers. Additionally, any text entered by the carrier in the Your Comment field on the **Carrier Self-Registration** page will appear in the Self-registration comment field on the **Carrier Details** page.

When this checkbox is selected, the **Carriers** list page will display a value of ‘Yes’ in the Review Required column, allowing the DA Global Admin to easily identify new self-registered carriers and review associated information. The **Review Required** checkbox appears as read only to users other than the DA Global Admin. The Review Required column is hidden from Carrier users.

Coordinator Tasks

Coordinators can do the following tasks:

- Create standing appointments
- View all existing standing appointments
- Approve or refuse submitted appointment requests
- Reschedule an appointment
- Cancel an appointment
- Delete an appointment
- View door assignments
- Run reports
- View distribution center details
- View carrier details
- View supplier details
- Registering a Carrier for Self-Registration

Creating a Standing Appointment

When creating standing appointments, you can have the system generate standing appointment shells on recurring days of the week for up to a set number of days in the future. You can also have standing appointment shells generated until a set future date.

To create a standing appointment:

- 1** Under the **Summary** pane, click **Create Standing Appointment**.

Dock Appointments / Create Standing Appointment

Create Standing Appointment

Start Date/Time:

Supplier: ▼

Recurrence Rule

Starting Date: Standing shells are generated starting from today's date or from the Start Date (whichever is later)

Ending Date: Generate ▼ days out into the future (cannot be more than 30)
standing shells

Recurrence:

Sunday

Monday


Tuesday

Wednesday

Thursday

Friday

Saturday

- 2 Enter the Start Date/Time or click  and select a date.
- 3 Select a Supplier or Carrier.
- 4 In the Recurrence Rule section, configure an Ending Date by selecting one of the following options. The maximum number of days that can be entered is displayed along with the Ending Date options and is configured by the **Maximum Number of Days Out to Generate Standing Shells** global setting.
 - Select **for** from the dropdown and enter the number of days in the future for which standing shells will be generated. When the **Auto-Generate Standing Shells** global setting is used in combination with this setting, users do not have to remember to update a standing appointment's Ending Date when an extension is needed. For more information on this setting, please see the Standing Appointments Settings section of the [Global Settings](#).
 - Select **until** from the dropdown and enter a future date until standing shells will be generated.
- 5 Select the days of the week on which the standing appointment will recur.
- 6 Select a Ship to address.
- 7 In the **Comment** box, enter any additional comments. If the comments are private, select the **Private** check box.
- 8 Click **Approve** to approve the request.

Showing Related Standing Appointments

To see all available reserved standing appointments:

- From the **Standing Appointments** list page, right-click on the desired appointment and select **Show Related Appointments**. The **Standing Appointments** page is displayed.

Approving Appointment Requests

As a Coordinator, you can approve appointments as regular appointments or you can approve them as a standing appointment.

Approving an Appointment

To approve a submitted appointment request:

- 1 Do one of the following:
 - From the **Submitted Appointments** page, right-click on the desired appointment and select **Approve**.
 - From the **Appointment Details** page, click **Approve**.

The **Door Assignments** page is displayed.

The screenshot shows the 'Door Assignments' page for Request # 1632384. The interface includes a navigation bar with tabs like 'Standing', 'Created (Draft)', 'Submitted', etc. Below the navigation bar, there are input fields for 'DC TestEmo', 'Request #', 'Start Time' (3/20/2018 8:00 AM), 'Door' (002), and 'Duration' (01:00). A calendar view is displayed below, showing a grid for Tuesday, 3/20/2018, with a yellow highlight for an appointment at 8:00 AM in door 002. The grid shows time slots from 12 AM to 11 PM and door numbers 001 to 009.

Note— You can also get to the **Door Assignment** page when rescheduling an Appointment.

- 2 In the Door field, select a door for the appointment.
- 3 In the Start Time field, select a start time for the appointment if different from current time.

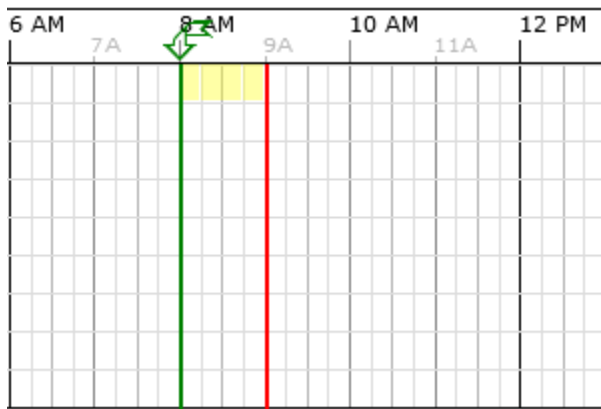
Or,

Move the green and red bars (date/time bars) by clicking on a door/time combination in the grid. To change the date, use one of the date controls at the top of the grid. See example below.

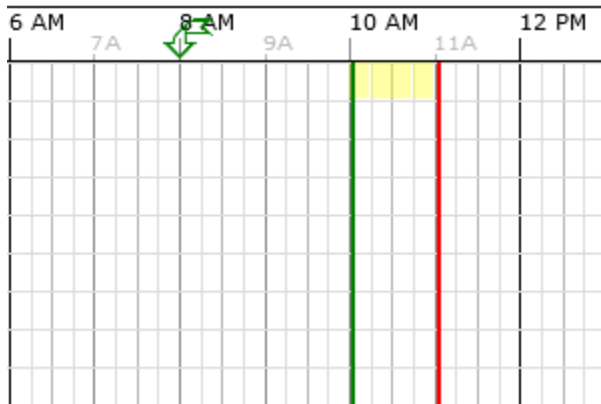
➡ **Note**— The green arrow, as shown below, marks the requested time. The green line can be moved to a different time, but the green arrow is stationary. The red line marks the end of the duration time.

Example:

The requested time for this appointment is 8 a.m. to 9 a.m.



This time does not work for you, but 10 a.m. does, click 10 a.m. for that door and the green and red bars automatically move to that time period.



4 In the Duration field, select the time duration for the door assignment.

Or,

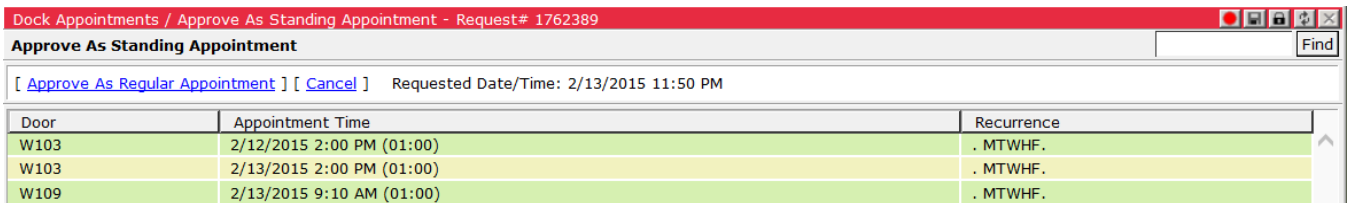
Drag the green or red bar to a new position to change the duration.

5 Click **Save** to assign the door and approve the appointment or click **Cancel** to return to the **Submitted Appointments** page.

Approving as a Standing Appointment

To approve a submitted appointment as a standing appointment:

- 1 From the **Submitted Appointments** page, right-click on the desired appointment and select **Appointment Details**. The **Appointment Details** page is displayed.
- 2 Select the **Use standing appointment** checkbox.
- 3 Click **Approve**. The **Approve as Standing Appointment** page is displayed.



- 4 Double-click on the door and appointment time you want to use and click **Save** from the **Door Assignments** page. The appointment is approved and the **Appointment Details - Approval** page is displayed.

Appointment Details Appointment History

UPDATE SELECT ADVICES CANCEL CHECK IN/OUT DELIVERY FAILURE RESCHEDULE DELETE EMAIL PRINT BACK

Track as hot appointment Yard Drop

Recurrence: .MTWHF
 Status: Approved Reason Code:
 Appointment Date/Time: 2/12/2015 2:00 PM (01:00) Door(s): W103
 Approval Number: 2762389 Approved By: DA Admin
 Request Number: 1762389 Requested By: DA Admin
 Requested Date/Time: 2/13/2015 11:50 [SUGGE] Estimated Unload Time: 00hr 03m could be inaccurate due to insufficient data

Trailer #: [] Select Equipment [v] Routing #: []
 Trailer Arrived: [] Trailer Departed: []

Carrier: DSG Test Carrier& (DSGT) - Descar Supplier: DSG Supplier& (TEST) - [v]

Address: street address, city city, st 344545, Contact: contact contact, Phone: 4523565465, Fax: 5646465

Driver: Select Driver... Preferred Carrier: Select Preferred Carrier...
 If load was brokered to you by a preferred carrier or you are a supplier tendering load to a preferred carrier - select carrier name in drop down box above

Ship To: DSGtestDC&

Comment COMMENT SAVED BY
 [] []

Private:

NEW DELETE

After saving this form, return to last screen [v]

| ! | O | N | D | PO # | Pro # | Supplier Name | Comments | STA | Event Code | Cases Ordere |
|-----|---|---|---|---------|-------|---------------|----------|-----|------------|--------------|
| !!! | | | | 5634653 | | rtreyrt | | | | |

5 Click **Back** to return to the **Approved Appointments** page.

Template-C: Editing Trailer Arrived/Departed Fields

For clients using Template-C of Descartes Dock Appointments Scheduling with Descartes Yard Management, the Trailer Arrived and Trailer Departed fields are editable for appointments in "Approved", "Arrived", "Departed" or "Delivery Failure" status without a linked trailer in Descartes Yard Management. This feature allows Coordinator users to update these fields from Descartes Dock Appointments to handle the following cases:

- The trailer was not explicitly arrived for the appointment in the Descartes Yard Management system
- The trailer was arrived at a later time (e.g. due to no Gate Guard on duty when the trailer actually arrived)

Once the linked trailer is arrived, the Trailer Arrived and Trailer Departed fields are automatically updated with the actual date and time values.

If no trailer has been linked to an "Approved" appointment, the Trailer Arrived and Trailer Departed fields are now editable.

Dock Appointments / Appointment Details - Approval# 2695690

Appointment Details
Appointment History

UPDATE
RE-SUBMIT
CANCEL

Track as hot appointment
 Yard Drop

Status: Approved

Appointment Date/Time: 11/2/2018 1:24 PM (01:00)

Approval Number: 2695690

Request Number: 1695690

Requested Date/Time: 11/2/2018 1:24 PM SUGGEST

Trailer #: Select Equipment Type...

Trailer Arrived: Trailer Departed:

Carrier: DSG Test Carrier (DSGT) - Descartes Systems Group

Address: 120 Randall Drive, Waterloo, ON 00011, CA
 Contact: Tom Lee, Phone: 4168552288, Fax: 222000222

Driver: Driver Test

Use the calendar controls to enter an arrived or departed date/time. These values are used to populate trailer fields in Descartes Yard Management:

- The entered Trailer Arrived value is used to populate the Arrive Date field when the appointment is selected on the **Arrive Trailer** window in Descartes Yard Management.
- The entered Trailer Departed value is used to populate the Depart Date field on the **Trailer Details** window in Descartes Yard Management.

Dock Appointments / Appointment Details - Approval# 2695690

Appointment Details Appointment History

UPDATE RE-SUBMIT CANCEL

Track as hot appointment Yard Drop

Status: Approved

Appointment Date/Time: 11/2/2018 1:24 PM (01:00)

Approval Number: 2695690

Request Number: 1695690

Requested Date/Time: 11/2/2018 1:24 PM SUGGEST

Trailer #: Select Equipment Type...

Trailer Arrived: 11/2/2018 9:33 AM Trailer Departed: 11/2/2018 1:39 PM

Carrier: DSG Test Carrier (DSGT) - Descartes Systems Group

Address: 120 Randall Drive, Waterloo, ON 00011, CA
Contact: Tom Lee, Phone: 4168552288, Fax: 222000222

Driver: Driver Test

License#:100 100 202

When a trailer is arrived in Descartes Yard Management using the appointment, the Trailer Arrived field is updated with the actual date/time value and is made read-only.

Dock Appointments / Appointment Details - Approval# 2695690

Appointment Details | Appointment History

UPDATE RE-SUBMIT CANCEL

Track as hot appointment Yard Drop

Status:

Appointment Date/Time:

Approval Number:

Request Number:

Requested Date/Time:

Trailer #:

Trailer Arrived: Trailer Departed:

Carrier:

Address: 120 Randall Drive, Waterloo, ON 00011, CA
Contact: Tom Lee, Phone: 4168552288, Fax: 222000222

Driver:

License#:100 100 202

When the trailer is departed in Descartes Yard Management, the Trailer Departed field is updated with the actual departed date/time value and made read-only.

Dock Appointments / Appointment Details - Approval# 2695690

Appointment Details | Appointment History

UPDATE RE-SUBMIT CANCEL


Track as hot appointment Yard Drop

Status: Approved

Appointment Date/Time: 11/2/2018 1:24 PM (01:00)

Approval Number: 2695690

Request Number: 1695690

Requested Date/Time: 11/2/2018 1:24 PM  SUGGEST

Trailer #: 112358 Select Equipment Type...

Trailer Arrived: 11/2/2018 9:43 AM Trailer Departed: 11/2/2018 10:15 AM

Carrier: DSG Test Carrier (DSGT) - Descartes Systems Group


Address: 120 Randall Drive, Waterloo, ON 00011, CA
 Contact: Tom Lee, Phone: 4168552288, Fax: 222000222


Driver: Driver Test


License#:100 100 202

When a trailer is arrived or departed for the appointment, the corresponding fields on the **Appointment Details** page become read-only as described above. Users can hover the mouse over these fields to display a tooltip explaining why the fields are no longer editable.

Request Number: 1695690

Requested Date/Time: 11/2/2018 1:24 PM  SUGGEST



Trailer #:  Select Equipment Type...

Trailer Arrived: 11/2/2018 9:43 AM Trailer Departed: 


















Carrier: DSG Test Carrier (DSGT) - Descartes Systems Group

Trailer Icons on List Pages

Appointments that have been updated with a Trailer Arrived and/or Trailer Departed date/time value but do not have an associated trailer arrived or departed in Descartes Yard Management are marked with unique icons on the appointments list pages.

-  – Appointments marked with this icon have an Arrival Time value but no associated trailer in Descartes Yard Management
-  – Appointments marked with this icon have a Departure Time value but no associated trailer in Descartes Yard Management

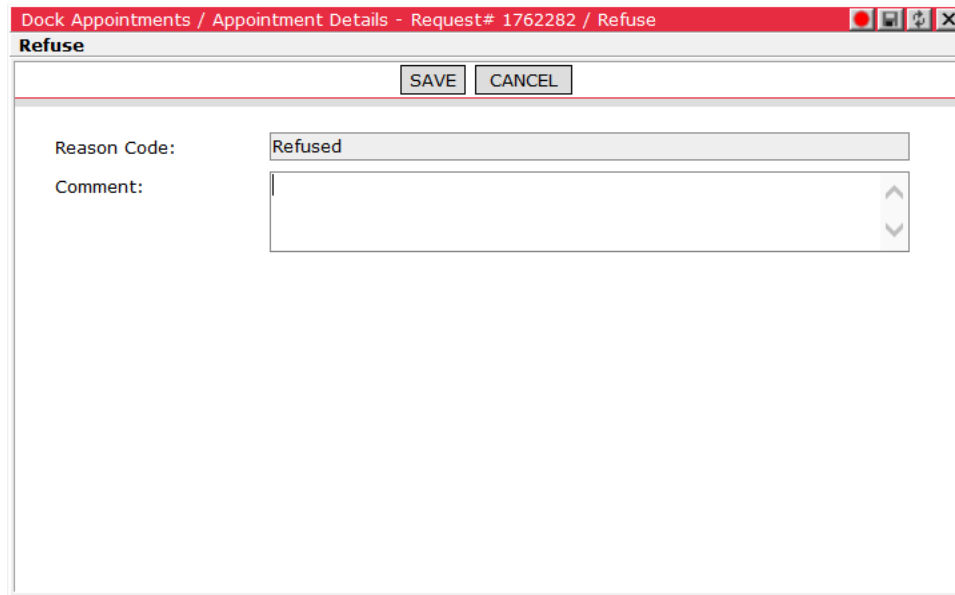
When users hover the mouse cursor over these icons, a tooltip is displayed.

| | | | | | |
|---|---|---|---------------------------|----------------------------------|-----------------------------|
|  |  | | 5/3/2018 | 5/3/2018 4:50:09 PM | 4739135 |
| Trailer ABC recorded arrival time: 11/14/2018 5:24 PM. Trailer is not in YM yet! | | | | | |
|  |  |  | 11/14/2018 12:24:25 PM | 11/14/2018 5:24:25 PM GMT | 4739981 4739135 |
|  |  |  | 11/14/2018 12:47:29 PM | 11/14/2018 5:47:29 PM GMT | 1234567 |
|  |  |  | 11/12/2018 1:57:21 PM | 11/12/2018 6:57:21 PM GMT | HYPO901 HYPO902 22222 |
| Trailer TRL1234567 recorded departure time: 11/12/2018 6:25 PM. Trailer was not departed in YM! | | | | | |
|  |  |  | 11/12/2018 1:42:29 PM | 11/12/2018 6:42:29 PM GMT | 2465312 2348874 |
|  |  |  | 10/24/2018 6:11:25 PM | 10/24/2018 11:11:25 PM GMT | DSGPO11 TEST_08.2 |

Refusing an Appointment Request

To refuse an appointment request:

- 1 From the **Submitted Appointments** page, right-click on the selected appointment and select **Refuse**. The **Refuse** window is displayed.



The screenshot shows a 'Refuse' dialog box with the following elements:

- Window title: Dock Appointments / Appointment Details - Request# 1762282 / Refuse
- Buttons: SAVE, CANCEL
- Reason Code: Refused
- Comment: (Empty text area)

- 2 In the Comment field, enter any comments.
- 3 Click **Save** to refuse the appointment or click **Cancel** to return to the **Submitted Appointments** page.

Rescheduling an Appointment

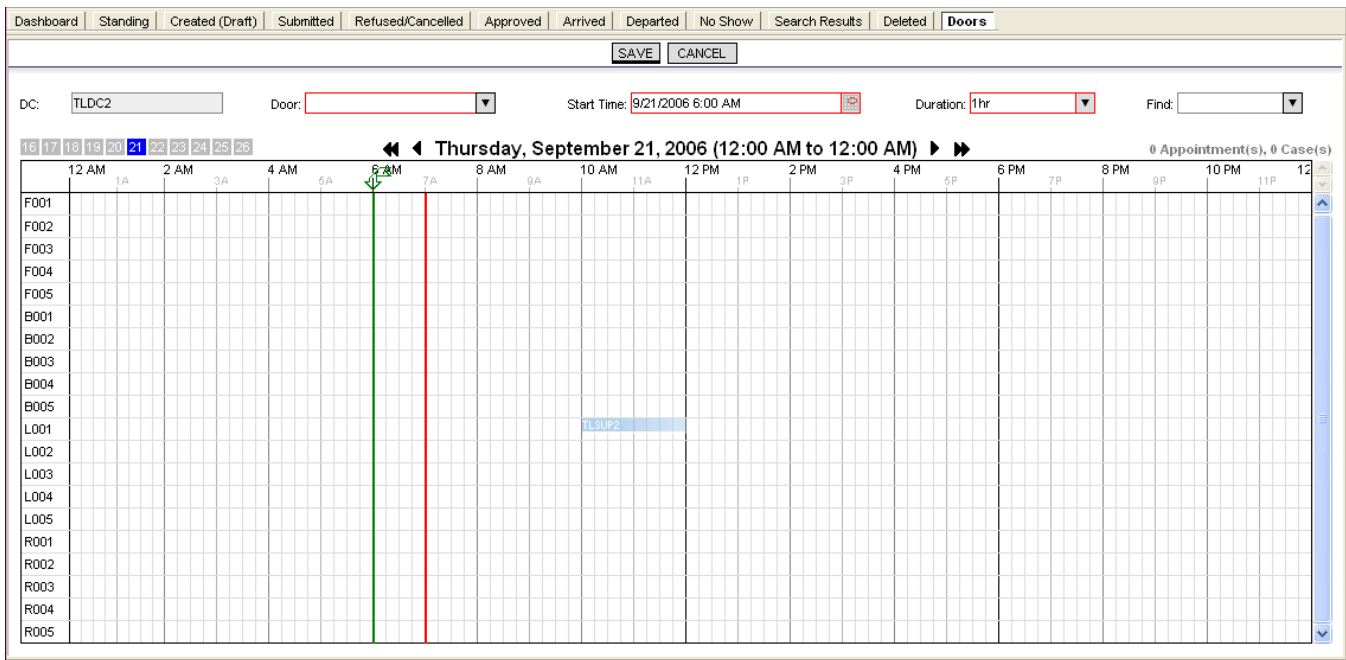
To reschedule an appointment:

- 1 From the **Approved** or **No Show/Delivery Failure** page, right-click on the selected appointment and select **Reschedule**.

Or,

From the **Appointment Details** page, click **Reschedule**.

The **Door Assignments** page is displayed.

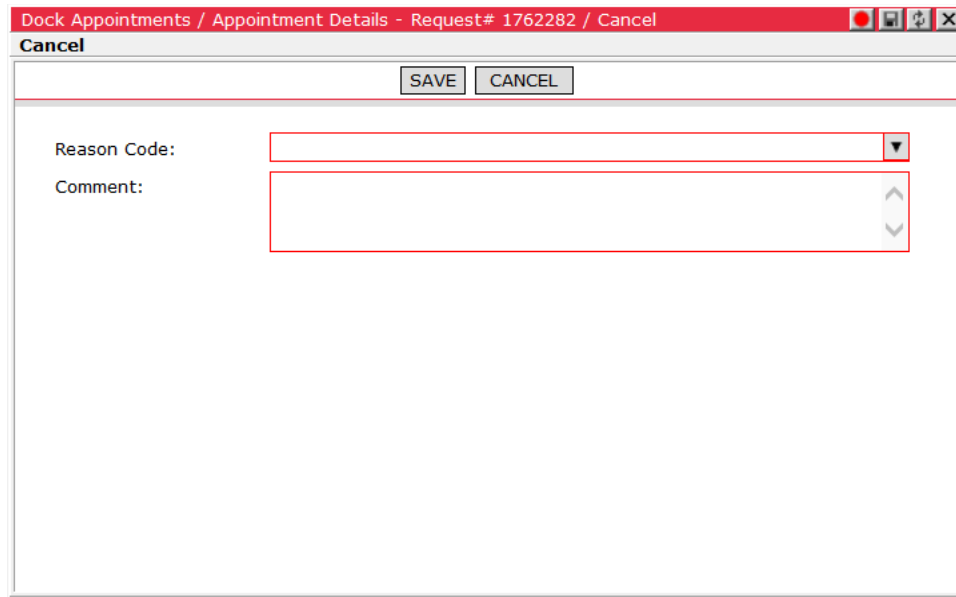


- 2 In the Door field, select a new door for the appointment.
 - **Note**— Multiple doors can be selected for an appointment.
- 3 In the Start Time field, select a new start time for the appointment. In the Start Time field, select a start time for the appointment if different from current time.
 - Or,**
 - Move the green and red bars (date/time bars) by clicking on a door/time combination in the grid. For example, see [Approving an Appointment](#).
 - To change the date, use one of the date controls at the top of the grid.
 - **Note**— The green arrow, as shown below, marks the requested time. The green line can be moved to a different time, but the green arrow is stationary. The red line marks the end of the duration time.
- 4 In the Duration field, select the time duration for the door assignment.
 - Or,**
 - Drag the green or red bar to a new position to change the duration.
- 5 Click **Save** to reschedule the appointment or click **Cancel** to return to the **No Show/Delivery Failure** page.
 - The appointment is returned to the **Approved Appointments** page after being rescheduled.

Canceling an Appointment

To cancel an appointment (Approved, Arrived or No Show/Delivery Failure):

- 1 From the selected page, right-click on the desired appointment and select **Cancel Appointment**. The **Cancel** window is displayed.

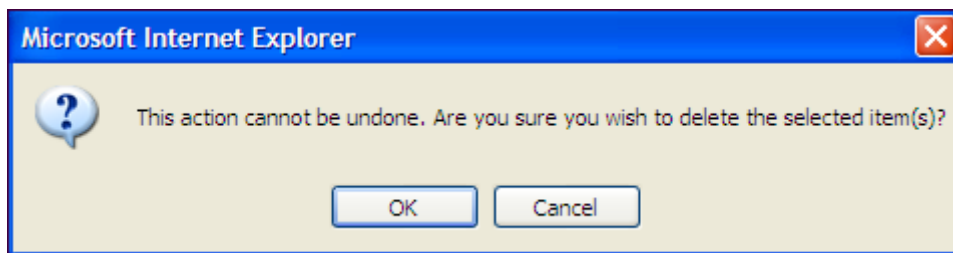


- 2 In the Reason Code field, select a reason for the cancellation.
- 3 In the Comment field, enter any comments.
- 4 Click **Save** to cancel the appointment or click **Cancel** to return to the appointment page.

Deleting an Appointment

To delete an appointment:

- 1 From the selected page, right-click on the desired appointment and select **Delete**. Descartes Dock Appointments Scheduling prompts you to confirm that you want to delete the appointment.



- 2 Click **OK** to delete or click **Cancel** to cancel deletion.

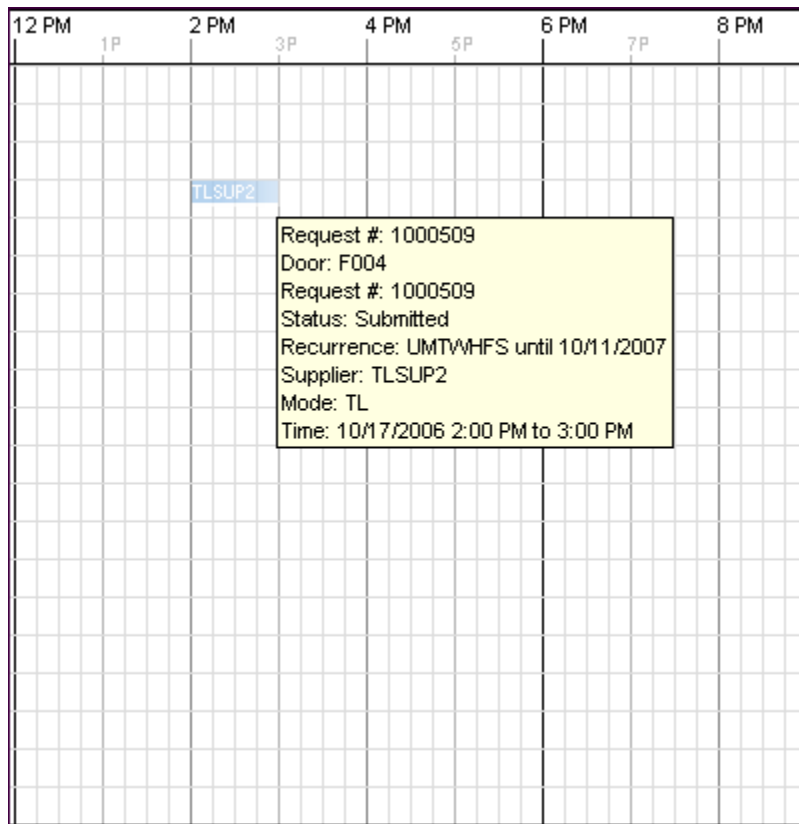
Viewing Door Assignments

To view door assignments:

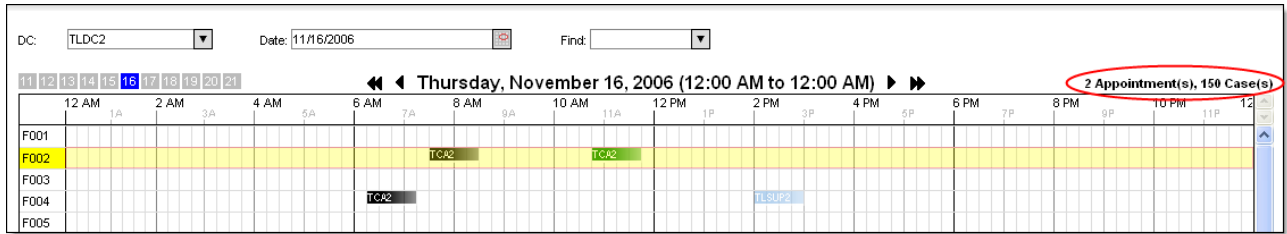
- 1 From the main menu, select **Dock Appointments > View Door Assignments**. The **Doors** page/tab is displayed.

- 2 Do one of the following:
 - Select a door and date to view.
 - In the **Find** box, select a field to search and then enter the information for that field. The fields are:
 - SCAC
 - Request#
 - Approval#
 - PO#
 - Probill#
 - Routing#

- Trailer#
 - Click a date in the date bar (5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | TODAY) to select a date to view.
 - Click one of the following to:
 - ◀◀ - move the date back two days
 - ◀ - move the date back one day
 - ▶ - move the date ahead one day
 - ▶▶ - move the date ahead two days
- 3** Hold the mouse over the door assignment to view information on that door assignment as shown below.

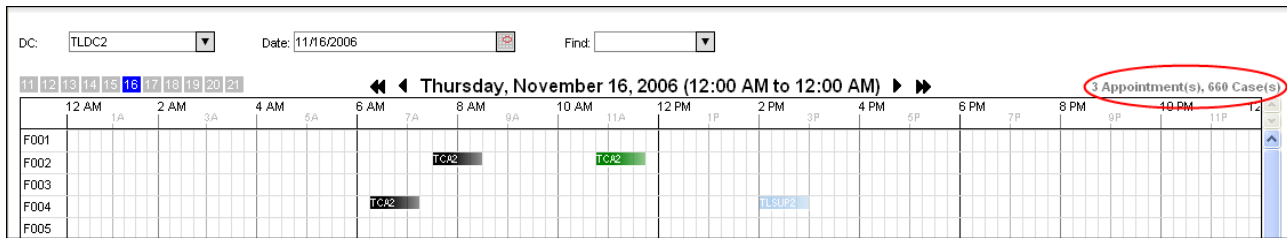


- 4** To calculate the number of cases for a door or doors, highlight the desired doors and the results will be shown in the top right-hand corner as shown below.



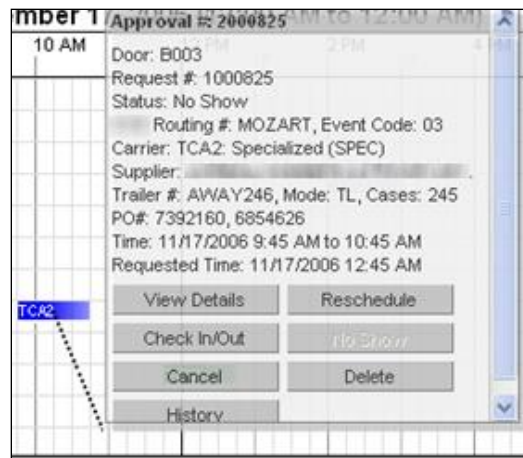
Two appointments were selected and the number of cases totaled 150. In a similar way, highlight the desired time frame within a day to view the appointments and cases scheduled for a given door range and/or time frame combination.

Note— When a day is first viewed; if it has approved, arrived on time, or late appointments; the total number of appointments and cases displays in the top right-hand corner. For the example above, when the **Door Assignment** page is first opened, the following displays.



If there a standing appointment is assigned to a door, it will not display as an appointment or with any cases.

- 5 Right-click on an appointment to view the approved appointments information and have the ability to select one of the following tasks for the appointment.
 - **View Details** – Displays the **Appointments Detail** page.
 - **Check In/Out** – Checks in or out the appointment.
 - **Cancel** – Cancels the appointment.
 - **History** – Displays the **Appointments History** page.
 - **Reschedule** – Allows user to reschedule the appointment.
 - **No Show/Delivery Failure** – Allows user to mark appointment as a 'No show'.
 - **Delete** – Deletes the appointment.



Viewing Distribution Center Details

To view a distribution center's details:

- 1 From the main menu, select **Dock Appointments > Setup > Distribution Centers**. The **Distribution Centers** page/tab displays.
- 2 Right-click and select **Distribution Center Details** from the menu. The **Distribution Center Details** page is displayed.
- 3 Click **Close** to return to the **Distribution Centers** page.

Viewing Carrier Details

To view a carrier's details:

- 1 From the main menu, select **Dock Appointments > Setup > Carriers**. The **Carriers** page/tab displays.
- 2 Right-click and select **Carrier Details** from the menu. The **Carrier Details** page is displayed.
- 3 Click **Close** to return to the **Carriers** page.

Viewing Supplier Details

To view a supplier's details:

- 1 From the main menu, select **Dock Appointments > Setup > Supplier**. The **Suppliers** page/tab displays.
- 2 Right-click and select **Supplier Details** from the menu. The **Supplier Details** page is displayed.

- 3 Click **Close** to return to the **Suppliers** page.

Registering a Carrier for Self-Registration

Coordinators can register new carrier users in the system and provide the login information to them. The new carrier user themselves can then complete the registration process. This process is described in the *Carrier Self-Registration Process* section.

DC Check-in User Tasks

The DC Check-in User can do the following tasks:

- check in and out an appointment
- move appointments to no show/delivery failure

Checking In/Out an Appointment

To check in an appointment:

- 1 From the **Approved Appointments** or **Arrived Appointments** page, right-click on the desired appointment and select **Check In/Out**. The **Check In/Out** window is displayed.

The screenshot shows the 'Check In/Out' window with the following fields and options:

- Reason Code:** Select Trailer Status... (dropdown menu open)
- Arrival Time:** (empty field)
- Departure Time:** (empty field)
- Door:** (empty field)
- Carrier:** (empty field)
- Yard Drop:** (empty field)
- Trailer Status:** Select Trailer Status... (dropdown menu)
- Comment:** (text area)

The dropdown menu for Reason Code contains the following items:

- Inbound - Inbound Freight
- Empty - Empty
- Outbound - Outbound Freight to Stores
- Returns - Trailers To Be Stripped
- COMPACTOR - Compactor
- SHUTTLE - Shuttle Trailer
- DAMAGE - Damaged Trailer

A 'SET TRAILER EMPTY' button is located at the bottom right of the form.

- 2 In the Reason Code field, select the reason for checking in the appointment. The reasons are configurable by customer.
- 3 In the Arrival Time, select the date and time of the arrival.
- 4 In the Door field, select the door for the appointment if it is different from one displayed.
- 5 In the Carrier field, select the carrier, if it is not already prefilled.
- 6 In the Comment field, enter any comments.
- 7 For clients using the Descartes Yard Management application in conjunction with Descartes Dock Appointments Scheduling, users can set trailer status in the system using the **Trailer Status** dropdown and **Set Trailer Empty** button on the **Check-In/Out** window.

- ➔ **Note**— If there are more than one "empty" trailer status defined in the Yard Management Statuses, then selecting **Set Trailer Empty** toggles through all of them.

When the **Check-In/Out** window is initially displayed for the appointment, the Trailer Status field is pre-populated to match the trailer status in Yard Management if the trailer has been arrived to the yard. If there is no trailer associated with the appointment, then the menu will not contain a value.

When a user sets the trailer status from the **Check-In/Out** window:

- If the trailer associated with the appointment is not in the yard, then the trailer status value is stored until a user arrives the trailer using the associated appointment number. The trailer status will pre-populate based on the values selected in the Check-In/Out window.
- If the trailer associated with the appointment is in the yard, then the trailer status value is sent to Yard Management and the trailer is updated.

- ➔ **Note**— If the trailer status is removed from the **Check-In/Out** window by selecting the no value selection from the **Trailer Status** menu, the trailer in Yard Management is not updated with this value.

- ➔ **Note**— When a user performs an Undo Check-In/Check-Out, no changes are made to previously saved trailer status in the appointment record.

When the **Sync Trailer Status** checkbox is selected for a particular DC but the Yard Management application is disabled, users can specify whether or not a trailer is empty via the **Trailer Empty** checkbox on the **Check-In/Out** window. This checkbox replaces the **Trailer Status** dropdown and **Set Trailer Empty** button when Yard Management is disabled from the **Global Settings** page.

- 8 Click **Check In** to check in the appointment or click **Cancel** to return to the previous page.

To check out an appointment:

- 1 From the **Arrived Appointments** page, right-click on the desired appointment and select **Check In/Out**. The **Check In/Out** window is displayed.
- 2 In the Departure Time field, select the date and time of the departure.
- 3 In the Comment field, enter any comments.
- 4 Click **Check In/Out** to check out the appointment or click **Cancel** to return to the previous page.

Moving an Appointment to No Show/Delivery Failure

To move an appointment to No Show/Delivery Failure:

On the **Approved Appointments** or **Arrived Appointments** page, right-click on the selected appointment, and select **Move to No Show** or **Move to Delivery Failure** depending on the template. The appointment will be moved to the **No Show** or **Delivery Failure** page.

Selecting Reason Code

DC Check-in Users can select a reason code from the **Reason Code** dropdown on the **Appointment Details** page for appointments in No Show/Delivery Failure, Arrived and Departed statuses. This allows users to skip the Check-In/Out process if only the reason code for an appointment needs to be changed.

Do Not Charge

Reason Code: Arrived - Driver Refused to Unload ▼

Checked-In By: DA Admin

Door(s): 103

Approved By: DA Admin

Estimated Unload Time: 00hr 00m could be inaccurate due to insufficient data

Appendix A: Using a Quadrant Page

The following example shows the **Party Relationship** page. The page displays with the following four quadrants displayed: the **Party Relationships** quadrant, **Carriers** quadrant, **Distribution Centers** and **Suppliers** quadrant.

The screenshot shows the 'Party Relationship' page with four quadrants:

- Party Relationships List | Row 1 - 9 of 9**

| State | Carrier | Supplier | Distribution Center |
|--------|-----------------------|-------------------------|---------------------|
| Active | bgt5 (bgt5) | Panasonic Aust (614960) | Altona DC |
| Active | Mosquito (BITE) | *All* | Altona DC |
| Active | Mosquito (BITE) | Tony Montana (TM1) | *All* |
| Active | KD Carrier (KDC) | Tony Montana (TM1) | *All* |
| Active | bgt6 (bgt6) | Panasonic Aust (614960) | Kewdale |
| Active | bgt5 (bgt5) | Sheridan (406923) | Altona DC |
| Active | All Transport (ALTRX) | Tony Montana (TM1) | Altona DC |
| Active | Mosquito (BITE) | Bobbi Bown (6005680) | Kewdale |
| Active | BG Test 2 (BGT2) | Panasonic Aust (614960) | Kewdale |
- Carrier List | Row 1 - 8 of 8**

| PartyName | PartyCode |
|--------------------|-----------|
| Mosquito | BITE |
| KD Carrier | KDC |
| BG Test 2 | BGT2 |
| bgt5 | bgt5 |
| bgt6 | bgt6 |
| Official Carrier 2 | OC2 |
| All Transport | ALTRX |
| bgt7 | bgt7 |
- Distribution Center List | Row 1 - 4 of 4**


| PartyName |
|--------------|
| DC1 |
| Kewdale |
| Altona DC |
| EasternCreek |
- Supplier List | Row 1 - 13 of 13**

| PartyName | PartyCode |
|-------------------|-----------|
| Tony Montana | TM1 |
| Sheridan | 406923 |
| Panasonic Aust | 614960 |
| Gen. Optical | 406266 |
| Naturalizer Shoes | 071243 |
| Rook | 220393 |
| Cadet Shoes | 2004244 |
| Dior | 004484 |
| Klein | 035423 |
| Rogue | 450689 |
| Sprague | 794966 |
| Bert and Ernie | B&E |
| Bobbi Bown | 6005680 |


Modifying Quadrants

The quadrants can be modified by using the control buttons on the blue bar. The following control buttons may appear within the blue bar of each quadrant:

- Displays a dropdown that displays additional quadrant options (each quadrant page will have its own set of options).
 - Note**— Once users select an option from the dropdown, the quadrant pane will become the view for the option chosen.
- Reduces the number of windows in view vertically from 2 to 1.
- Restores the number of windows in view vertically from 1 to 2.
- Reduces the number of windows in view horizontally from 2 to 1.
- Restores the number of windows in view horizontally from 1 to 2.
- Reduces the number of quadrants in view on the Dashboard to 1.

-  — Restores the number of windows in view on the Dashboard to the previous number.

Selecting an Option for a Quadrant

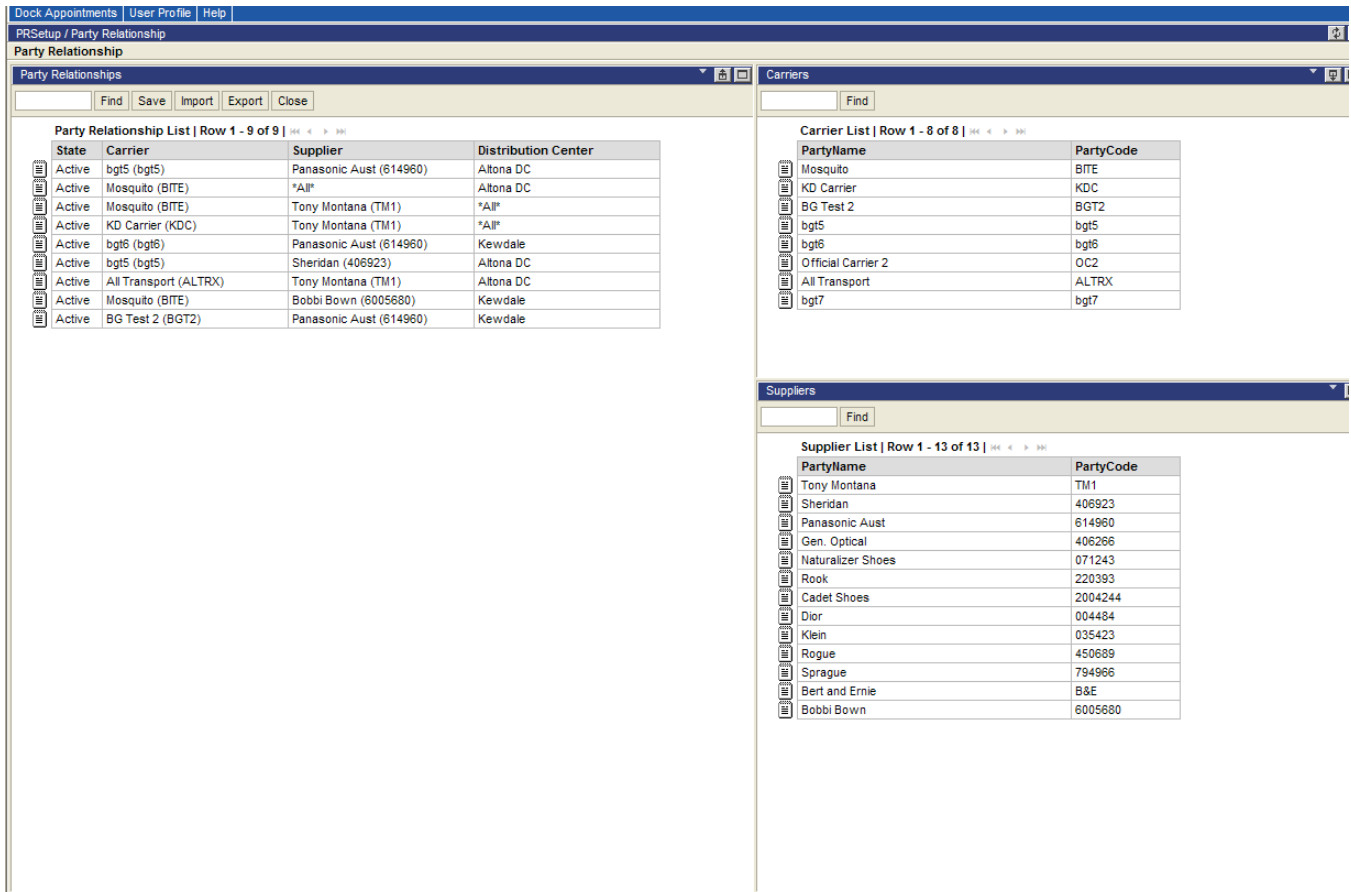
To select an option for the fourth quadrant, click  in the blue bar on that quadrant. Select an option for the quadrant.

Changing the Location of the Quadrants


A user can change the locations of the quadrants by using the blue bar dropdown options. For instance, in the example above, if the user wants the **Distribution Centers** in the top right pane, the user selects **Distribution Centers** from the dropdown list in that quadrant. The **Carriers** quadrant becomes the **Distribution Centers** quadrant and previous **Carriers** quadrant is now blank.

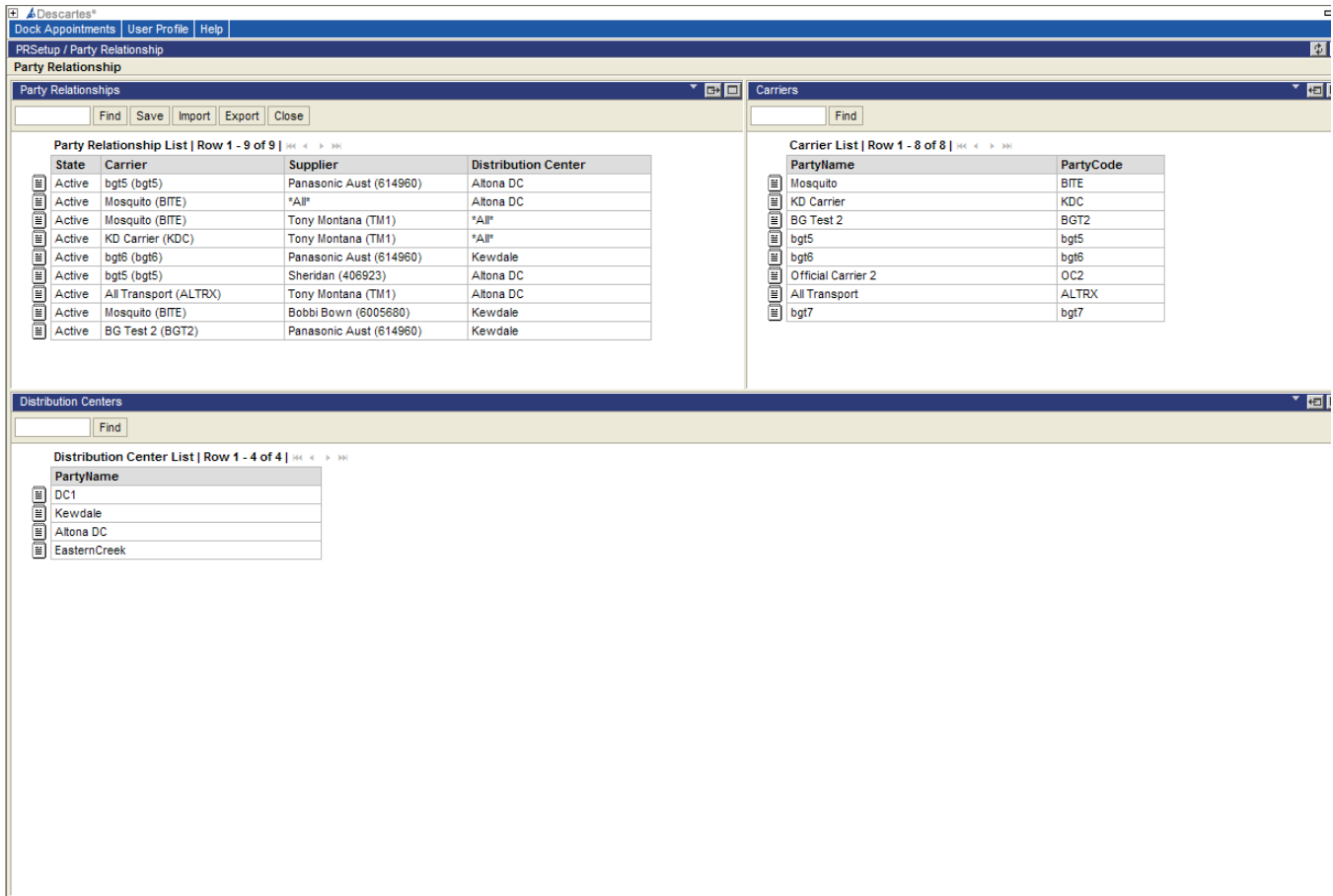
Increasing the Size of a Quadrant

If the user wants to extend the **Party Relationships** quadrant to half the page (vertically), the user selects  on the **Party Relationships** blue bar. The page now appears as follows:





To return the **Party Relationships** quadrant to its previous view, click .

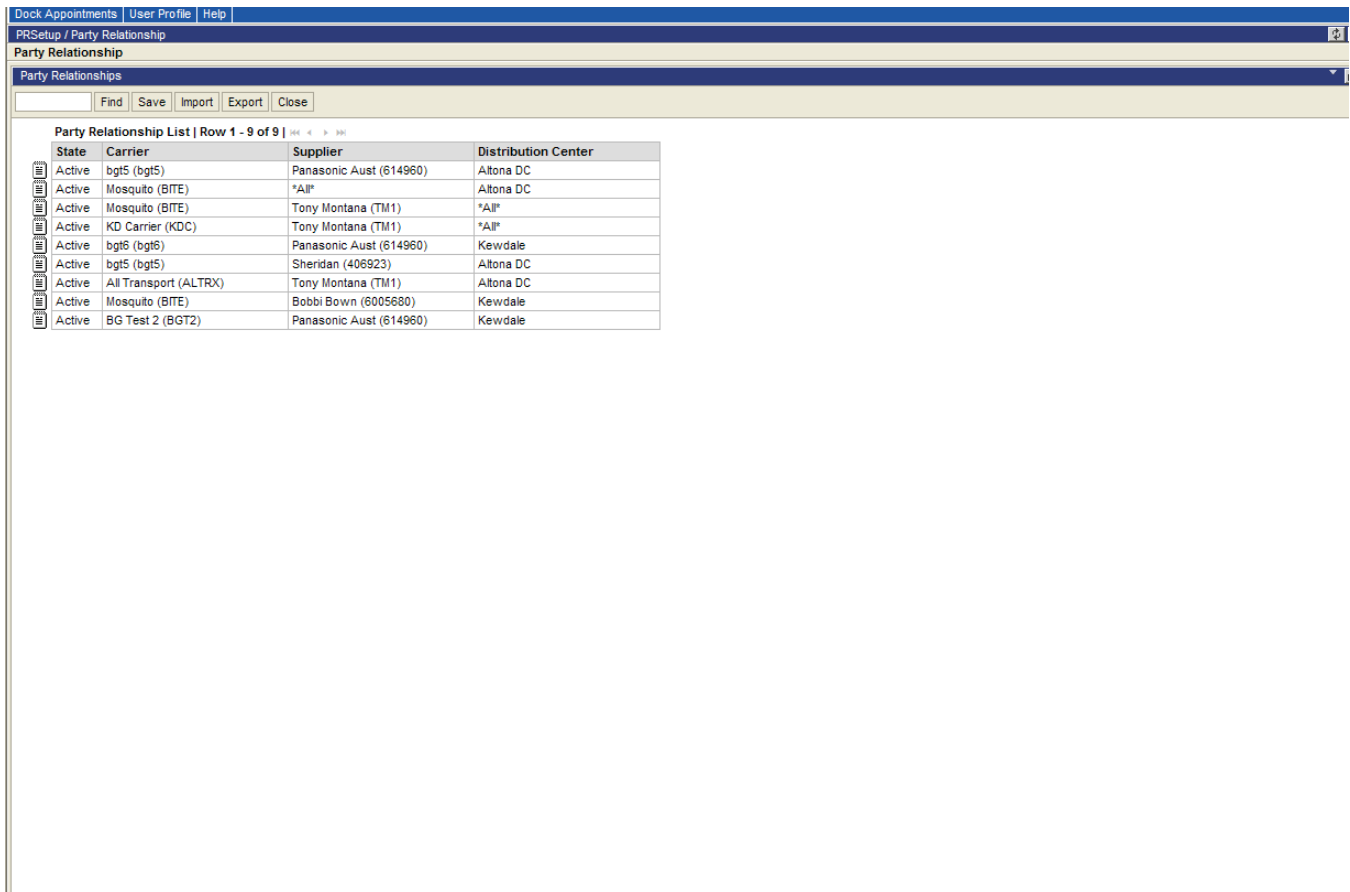
A user can also increase the quadrant size horizontally. For instance, if the user wants to increase the size of the **Distribution Centers** quadrant (on a four quadrant page), the user clicks  on the **Distribution Centers** blue bar. The page now appears as follows:




To return the **Distribution Centers** quadrant to its previous view, click .

Maximizing and Minimizing the Quadrant

A user can choose to view the quadrant as a single page by clicking . Using the **Party Relationship** example, if the user clicks  on the **Party Relationships** quadrant, the page appears as follows:



To return the **Party Relationships** quadrant to its previous view, click .

Refreshing Data

On a quadrant page there is only one option that controls all elements, and that is the **Refresh** button.

To manually refresh Descartes Dock Appointments Scheduling data:

- 1 Check to see if the **Refresh** () button is flashing red.

The **Refresh** button is located in the top right corner of the window, underneath the logout button.

- 2 Click the **Refresh** button to update the data.

Appendix B: Available Commands by User and Appointment Status

The tables in this section provide an overview of what actions are permitted per user role for appointments in a given status. "Available Options" are commands (buttons or right-click options) that are always displayed for the given user and status. "Contingent Options" are options that are only displayed under certain conditions, such as a change of an appointment's information or the application of a setting.

DC Admin and Coordinator Users

Appointment Request List Pages

The following table lists the right-click options available to DC Admin and Coordinator users from appointment list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|--|--------------------|
| Created | Appointment Details Appointment History Approve Submit Delete Print | |
| Submitted | Appointment Details Appointment History Auto Approve Approve Refuse Cancel Delete Print | |
| Refused/Cancelled | Appointment Details Appointment History Approve Submit Delete Print | |

| | | |
|--------------------------|--|--|
| Approved | Appointment Details Appointment History Cancel Check In/Out Delivery Failure/No Show Delete Print | |
| Arrived | Appointment Details Appointment History Cancel Check In/Out Undo Check In Delivery Failure/No Show Delete Print | |
| Departed | Appointment Details Appointment History Undo Check Out Delete Print | |
| Delivery Failure/No Show | Appointment Details Appointment History Cancel Check In/Out Undo Delivery Failure/No Show Delete Print | |
| Deleted | Appointment Details Appointment History Print | |

➔ **Note**— With multiple records selected from the appointment request list pages, users can only select the **Cancel** right-click option for multiple “Submitted” or “Approved” status appointments or the **Print** right-click option for all status appointments.

Appointment Request Forms

The following table lists the buttons available to DC Admin and Coordinator users on appointment request forms by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|--|---------------------------------|
| New/Unsaved | Header: Save Draft Approve Submit Cancel PO Line: New Delete Multiple PO Entry | |
| Created (Draft) | Header: Save Draft Approve Submit Delete Email Print Back PO Line: New Delete Multiple PO Entry | Select Advices (Global Setting) |

| | | |
|-------------------|---|---|
| Submitted | <p>Header: Update Approve Refuse Cancel Delete Email Print Back</p> <p>PO Line: New Delete Multiple PO Entry</p> | Auto Approve (Global Setting) Select Advices |
| Refused/Cancelled | <p>Header: Update Approve Submit Delete Email Print Back</p> <p>PO Line: New Delete Multiple PO Entry</p> | |

| | | |
|----------|--|----------------|
| Approved | Header: Update Cancel Check In/Out Delivery Failure/No Show Reschedule Delete Email Print Back PO Line: New Delete Multiple PO Entry | Select Advices |
| Arrived | Header: Update Cancel Check In/Out Undo Check In Delivery Failure/No Show Delete Email Print Back PO Line: New Delete Multiple PO Entry | |

| | | |
|---------------------------------|---|--|
| <p>Departed</p> | <p>Header: Update Undo Check Out Delete Email Print Back PO Line: New Delete Multiple PO Entry</p> | |
| <p>Delivery Failure/No Show</p> | <p>Header: Update Cancel Check In/Out Undo Delivery Failure/No Show Reschedule Delete Email Print Back PO Line: New Delete Multiple PO Entry</p> | |
| <p>Deleted</p> | <p>Email Print Back</p> | |

Appointment Advice List Pages

The following table lists the right-click menu options available to DC Admin and Coordinator users on appointment advice list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--|
| Created (Draft) | Advice Details Appointment History Delete Print | |
| Advice | Advice Details Appointment History Delete Print New Appt from Advices | |
| Processed Advice | Advice Details Appointment History Delete Print | Appt Request Details: This option is only available in cases where appointment request information is present for the advice |
| Deleted | Advice Details Appointment History Print | |

Appointment Advice Request Form

The following table lists the buttons available to DC Admin and Coordinator users on appointment advice request pages by appointment's status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--------------------|
| New | Header: Save Draft Submit Cancel PO Line: New Delete Multiple PO Entry Advanced PO Search | |
| Created (Draft) | Header: Save Draft Submit Delete Email Print Back PO Line: New Delete Multiple PO Entry Advanced PO Search | |
| Advice | Header: Update Delete Email Print Back PO Line: New Delete Multiple PO Entry Advanced PO Search | |

| | | |
|------------------|---|--|
| Processed Advice | Update PRO Number Delete Email Print Back | Appt Request Details: This option is only available in cases where appointment request information is present for the advice |
| Deleted | Email Print Back | |

Appointment Options on Door Assignments Page

The following table lists the menu options available to DC Admin and Coordinator users on the **Door Assignments** page by appointment status.

| Appointment Status | Available Options | Contingent Options |
|-------------------------------|--|--------------------|
| Approved | Appointment Details Appointment History Cancel Check In/Out Delivery Failure/No Show Reschedule Delete | |
| Arrived | Appointment Details Appointment History Cancel Check In/Out Delivery Failure/No Show Delete | |
| Departed | Appointment Details Appointment History Delete | |
| Delivery Failure/No Show | Appointment Details Appointment History Cancel Check In/Out Reschedule Delete | |
| Cancelled by carrier/supplier | Appointment Details Appointment History Delete | |

Standing Appointments List Pages

The following table lists the right-click menu options available to DC Admin and Coordinator users on standing appointment list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--------------------|
| Refused | Appointment Details Appointment History Approve Delete | |
| Scheduled | Appointment Details Appointment History Show Related Appointments Delete | |

Standing Appointment Request Forms

The following table lists the buttons available to DC Admin and Coordinator users on standing appointment request pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|--|--------------------|
| New (Unsaved) | Approve Cancel | |
| Refused | Update Approve Delete Email Back | |
| Scheduled | Update Reschedule Show Related Appointments Delete Email Back | |

 **Note**— Auto approval functionality is available only when the setting is enabled for standing shells on the **Global Settings** page.

Carrier Users

Appointment Request List Pages

The following table lists the right-click menu options available to Carrier users on appointment list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------------|---|--------------------|
| Created | Appointment Details Appointment History Print | |
| Submitted | Appointment Details Appointment History Cancel Print | |
| Refused/Cancelled | Appointment Details Appointment History Submit Print | |
| Approved | Appointment Details Appointment History Cancel Print | |
| Arrived | Appointment Details Appointment History Print | |
| Departed | Appointment Details Appointment History Print | |
| Delivery Failure/No Show | Appointment Details Appointment History Print | |
| Deleted | Appointment Details Appointment History Print | |

 **Note**— With multiple records selected from the appointment request list pages, users can only select the **Cancel** right-click option for multiple

“Submitted” or “Approved” status appointments or the **Print** right-click option for all status appointments.

Appointment Request Forms

The following table lists the buttons available to Carrier users on appointment request forms by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|--|---|
| New/Unsaved | Header: Save Draft Submit Cancel PO Line: New Delete Multiple PO Entry | |
| Created (Draft) | Header: Save Draft Submit Email Print Back PO Line: New Delete Multiple PO Entry Change Quantity | Select Advices (Global Setting) |
| Submitted | Header: Update Cancel Email Print Back PO Line: New Delete Multiple PO Entry Change Quantity | Resubmit: appears when PO quantity or mandatory data has changed after submission by carrier/supplier Select Advices |

| | | |
|-------------------|--|----------|
| Refused/Cancelled | Header: Update Submit Email Print Back PO Line: New Delete Multiple PO Entry Change Quantity | Resubmit |
| Approved | Header: Update Cancel Email Print Back PO Line: New Multiple PO Entry Change Quantity | Resubmit |
| Arrived | Update Email Print Back | Resubmit |
| Departed | Update Email Print Back | Resubmit |

| | | |
|--------------------------|--|----------|
| Delivery Failure/No Show | Header: Update Email Print Back PO Line: New Multiple PO Entry Change Quantity | Resubmit |
| Deleted | Email Print Back | |

Appointment Advice List Pages

The following table lists the right-click options available to Carrier users on appointment advice list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--|
| Created (Draft) | Advice Details Appointment History Print | |
| Advice | Advice Details Appointment History Print New Appt from Advices | |
| Processed Advice | Advice Details Appointment History Print | Appt Request Details: This option is only available in cases where appointment request information is present for the advice |
| Deleted | Advice Details Appointment History Print | |

Appointment Advice Request Form

The following table lists the buttons available to Carrier users on appointment advice request forms by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--|
| Created (Draft) | Header: Save Draft Submit Email Print Back PO Line: New Delete Multiple PO Entry Change Qty | |
| Advice | Header: Update Email Print Back PO Line: New Delete Multiple PO Entry Change Qty | |
| Processed Advice | Update PRO Number Email Print Back | Appt Request Details: This option is only available in cases where appointment request information is present for the advice |
| Deleted | Email Print Back | |

Supplier Users

Appointment Request List Pages

The following table lists the right-click options available to Supplier users on appointment request list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------------|---|--------------------|
| Created | Appointment Details Appointment History Print | |
| Submitted | Appointment Details Appointment History Cancel Print | |
| Refused/Cancelled | Appointment Details Appointment History Submit Print | |
| Approved | Appointment Details Appointment History Cancel Print | |
| Arrived | Appointment Details Appointment History Print | |
| Departed | Appointment Details Appointment History Print | |
| Delivery Failure/No Show | Appointment Details Appointment History Print | |
| Deleted | Appointment Details Appointment History Print | |

Appointment Request Forms

The following table lists the buttons available to Supplier users on appointment request forms by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|--|---|
| New (Unsaved) | Header: Save Draft Submit Cancel PO Line: New Delete Multiple PO Entry | |
| Created (Draft) | Header: Save Draft Submit Email Print Back PO Line: New Delete Multiple PO Entry Change Quantity | Select Advices (Global Setting) |
| Submitted | Header: Update Cancel Email Print Back PO Line: New Delete Multiple PO Entry Change Quantity | Resubmit: appears when PO quantity or mandatory data has changed after submission by carrier/supplier Select Advices |

| | | |
|-------------------|--|----------------------------|
| Refused/Cancelled | Header: Update Submit Email Print Back PO Line: New Delete Multiple PO Entry Change Quantity | Resubmit |
| Approved | Header: Update Cancel Email Print Back PO Line: New Multiple PO Entry Change Quantity | Resubmit Select Advices |
| Arrived | Update Email Print Back | Resubmit |
| Departed | Update Email Print Back | Resubmit |

| | | |
|--------------------------|--|----------|
| Delivery Failure/No Show | Header: Update Email Print Back PO Line: New Multiple PO Entry Change Quantity | Resubmit |
| Deleted | Email Print Back | |

Appointment Advice List Pages

The following table lists the right-click options available to Supplier users on appointment advice list pages by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--|
| Created (Draft) | Advice Details Appointment History Print | |
| Advice | Advice Details Appointment History Print New Appt from Advices | |
| Processed Advice | Advice Details Appointment History Print | Appt Request Details: This option is only available in cases where appointment request information is present for the advice |
| Deleted | Advice Details Appointment History Print | |

Appointment Advice Request Form

The following table lists the buttons available to Supplier users on appointment advice request forms by appointment status.

| Appointment Status | Available Options | Contingent Options |
|--------------------|---|--------------------|
| New (Unsaved) | Header: Save Draft Submit Cancel PO Line: New Delete Multiple PO Entry Advanced PO Search | |
| Created (Draft) | Header: Save Draft Submit Email Print Back PO Line: New Delete Multiple PO Entry Advanced PO Search Change Qty | |
| Advice | Header: Update Email Print Back PO Line: New Delete Multiple PO Entry Advanced PO Search Change Qty | |

| | | |
|-------------------------|---|---|
| <p>Processed Advice</p> | <p>Update PRO Number Email Print Back</p> | <p>Appt Request Details: This option is only available in cases where appointment request information is present for the advice</p> |
| <p>Deleted</p> | <p>Email Print Back</p> | |

Appendix C: Update or Resubmit Appointments Via API

For Template-C of Descartes Dock Appointments Scheduling, the Submit External Appointment Request API supports appointment updates and resubmissions. DA Admin users can enable this functionality by selecting the **Allow External Appointment Requests** setting in the Auto Scheduling Global Settings section of the **Global Settings** page.

Dock Appointments / Global Settings

Distribution Centers | Time Index | Carriers | Suppliers | **Global Settings** | Global Hours/Holidays Settings | Global Notifications | Import Carriers/Suppliers

SAVE CLOSE

Auto Scheduling Global Settings

Per Party Auto Scheduling Option

Validate AutoSchedule Appointment Line PO/ASN

Validate Appointment Date Against POs Delivery Date

Auto-Approved Appointment Assumes Standing Shell Duration (when use standing shell option is selected)

Allow External Appointment Requests (API calls)

The update and resubmit functionality of the Submit External Appointment Request API is described as follows:

- If an appointment Request Number value is sent in the API call, the system will handle it as an update to an existing appointment. If no appointment Request Number value is sent, it is handled as a new appointment request.
- The system will compare the appointment update with the existing appointment to determine whether an "Approved" status appointment needs to be resubmitted after the update. If the update does not include changes to appointment line items, the appointment will remain in "Approved" status. If the appointment update has a different set of line items or the set of line items is the same, but the case quantity has been changed for one or more line items, an appointment in "Approved" status will be reverted to "Submitted" status.
- Users can add, update or delete purchase order line items using this API. The API call will include a list of purchase orders with each update. For each incoming purchase order line item:
 - If the purchase order exists on the appointment, it will be updated
 - If the purchase order does not exist on the appointment, it will be added to the appointment
 - Purchase orders that exist on the appointment but not included in the update API will be removed from the appointment
- The API will only update certain fields in the existing appointment. The remote re-submission via API will preserve changes made to the appointment header information by other parties through the Descartes Dock Appointments Scheduling user interface.

- When users call the Submit External Appointment API to update an existing appointment with additional appointment line items, the new line items are flagged as "Y" ("AddOn" flag) in the N column on the **Appointment Details** page to indicate newly added lines. This AddOn flag is used to notify users which appointment line items have been added to the appointment since the last time the appointment was acted upon by the DC user (i.e. approved, cancelled or refused). The AddOn flag will not appear for a line item if the appointment has never been approved, cancelled or refused in the past. The carrier or supplier can continue to modify the appointment by adding line items until the appointment request is approved by the DC user. After the appointment is acted upon by the DC user, any new line items are marked with the AddOn flag, i.e. with a "Y" in the N column on the **Appointment Details** page. Once the appointment is approved again, the AddOn flag is removed as the appointment line items are no longer new.
- Users can create and update "Draft" appointment requests before submitting the request for approval. The API will only update "Draft" status appointments when the appointment in the application is still in "Draft" status. If the appointment has any other status (e.g. "Submitted") the update will fail. The appointment status is specified using the StatusCode attribute in the <DocMonAppointment> element of the input XML. Only values of 100 (Draft) and 200 (Submitted) are permitted.
- When a SupplierLocationCode is provided in the input XML, the value is used to identify the supplier location and supplier party. SupplierPartyCode can be omitted from the XML when the SupplierLocationCode is specified. When both the SupplierPartyCode and SupplierLocationCode are specified in the XML, they must both reference the same supplier party. Otherwise the API will fail. The SupplierLocationCode attribute is found in the DasExternalAppointmentRequestWithLineItems element in the input XML.
- The following optional fields are also supported:
 - EquipmentID attribute, representing the Trailer# field on the **Appointment Details** page header
 - YardDropFl attribute, representing the Yard Drop field on the **Appointment Details** page header
 - RoutingNumber attribute, representing the Routing# field on the **Appointment Details** page header
 - The ApptLineFlags attribute, representing the FLR/PLT flag in the **Appointment Details** page PO entry section

Lookup Functionality

The lookup functionality allows multiple candidate appointments that match the header criteria to be shortlisted so that more refined appointment line level matching can identify a unique candidate appointment that needs to be updated.

This functionality looks up all appointments matching header-level business keys provided in the **DASExternalAppointment** element. Multiple appointments can be found with this new functionality.

Any matching appointment IDs are saved and used to narrow the search for the specified **DASExternalAppointmentLine** elements.

If an appointment line record specified on the XML is not found, the system treats it as a candidate to be added to the appointment.

- ➔ **Note**— All subsequent **DASExternalAppointmentLine** elements must be not found or belong to the same appointment. If different **DASExternalAppointmentLine** elements match different appointments, the API reports an error in the output status record for the current **DASExternalAppointment** element, ignores it and moves on to the next **DASExternalAppointment** element (if it is present in the input XML).

Using MonAppointmentLocation Table Fields to Specify Business Key Parts

You can use fields from the MonAppointmentLocation table to specify business key parts. To refer to fields from this table, use the following aliases:

- **dc:** for DC location record
- **c:** for carrier location record
- **s:** for supplier location record (header or line level)

Example:

```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommon" ExtDocControlID="1FD41C07-
  BE53-4EC5-9F28-BC8CDF035329">
    <BusinessKeyPart Name="dc.FacilityCode" Value="INI1"/>
    <BusinessKeyPart Name="CreatedDT" ValueFrom="2010-01-
  01" ValueTo="2020-12-31"/>
    <BusinessKeyPart Name="StatusCode" Value="300"/>
    <BusinessKeyPart Name="RoutingNumber" Value="YARD 6/5/12"
  Optional="1"/>
    <BusinessKeyPart Name="TotalQty" ValueFrom="6" ValueTo="7"
  Optional="2"/>
    <BusinessKeyPart Name="c.DirectionsLabel" Value="URL" Optional="3"/>
  </DASExternalAppointment>
</parmDASExternalAppointment>
```

BusinessKeyPart Element Attributes

When the **Optional** attribute is specified, the API adds a "field is empty" condition when selecting records in addition to the matching value condition. The "field is empty" condition is broader than NULL fields and includes:

- NULL or empty character-type fields
- NULL or zero value numeric fields

When matching records are selected in the database, the API applies additional process for all **Optional BusinessKeyParts**:

- If a single record is found with a non-empty value matching the condition, the record is used
- If more than one record is found with a non-empty value matching the condition, the API fails
- If no records are found with non-empty values matching the condition, the API looks for records where the corresponding field is "empty"
- If a single record is found with an empty value in the corresponding field, the record is used
- If more than one record is found with an empty value in the corresponding field, the API fails
- If no records are found with empty values matching the condition, the line is considered as "New Line to be added" candidate.

When a single record is found after applying the **Optional BusinessKeyPart**, the process is then repeated for the remaining optional **BusinessKeyParts** in the order of their [Optional] attribute value to ensure that the record is valid for each. If so, the record is updated. If not, the **DASExternalAppointmentLine** element is then considered as a "New Line" added to the appointment.

If multiple **BusinessKeyPart** elements are marked as **Optional**, each must have a unique value. For example:

```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommonAddNew" ExtDocControlID="1FD4
1C07-BE53-4EC5-9F28-BC8CDF035329">
    <BusinessKeyPart Name="dc.FacilityCode" Value="INI1"/>
    <BusinessKeyPart Name="AppointmentDTBegin" ValueFrom="2020-07-01
00:00" ValueTo="2020-07-01 23:59"/>
    <BusinessKeyPart Name="StatusCode" Value="300"/>

    <DASExternalAppointmentLine ExtDocControlID="Line1">
<BusinessKeyPart Name="s.PartyCode" Value="SUP101"/>
    <BusinessKeyPart Name="PONumber" Value="20299205"/>
    <BusinessKeyPart Name="ProbillNumber" Value="BOL1234" Optional="1"/>
    <BusinessKeyPart Name="EventCode" Value="HALLOWEEN" Optional="2"/>
    <BusinessKeyPart Name="OOSFlag" Value="Y" Optional="3"/>
    <Field Name="NumCasesShipped" Value="100"/>
    <Field Name="APL_UDF8" Value="ABC"/>
  </DASExternalAppointmentLine>
</DASExternalAppointment>
</parmDASExternalAppointment>
```

Each business key marked in this way is processed in order of the Optional value (1, 2, 3, etc.).

When the **OrIsNull** attribute is present and set to "1" in the XML, the API attempts to find either records with a matching value/range or records where the field is NULL. This attribute can be used at the header or line level.

Example:

```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommon" ExtDocControlID="1FD41C07-
BE53-4EC5-9F28-BC8CDF035329">
    <BusinessKeyPart Name="dc.FacilityCode" Value="INI1"/>
    <BusinessKeyPart Name="CreatedDT" ValueFrom="2020-07-01
00:00" ValueTo="2020-07-01 23:59"/>
    <BusinessKeyPart Name="StatusCode" Value="300"/>
    <BusinessKeyPart Name="s.PartyCode" Value="SupplierCodeABC"
OrIsNull="1"/>
    <Field Name="OverrideTotalPallets" Value="20"/>
  </DASExternalAppointment>
</parmDASExternalAppointment>
```

With the **ValueFrom** and **ValueTo** attributes, you can specify a range of values to narrow the search for the appointment to update.

Example:

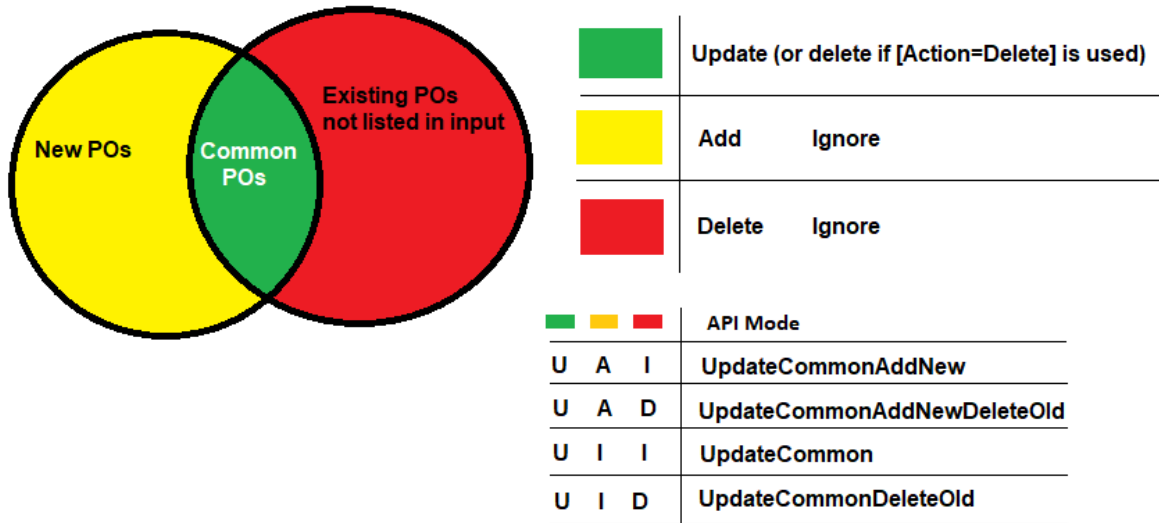
```
<parmDASExternalAppointment>
  <DASExternalAppointment Mode="UpdateCommon" >
    <BusinessKeyPart Name="dc.LocationCode" Value="DSGtestDC4"/>
    <BusinessKeyPart Name="RequestedDT" ValueFrom="2019-12-18T00:00:00" ValueTo="2019-12-18T23:59:59"/>
```

Update Modes Added

Four update modes can be specified as attributes of the **DASExternalAppointment** element.

```
<parmDASExternalAppointment>
  <DASExternalAppointment
    Mode="UpdateCommonAddNewDeleteOld"
    ExtDocControlID="1FD41C07-BE53-4EC5-9F28-BC8CDF035329" >
    <BusinessKeyPart Name="RequestNumber" Value="1803822"/>
    <Field Name="EquipmentID" Value="PAA.TRL-1"/>
    <DASExternalAppointmentLine>
      <BusinessKeyPart Name="PONumber" Value="P01"/>
      <Field Name="APL_UDF8" Value="Unilev 1"/>
      <Field Name="NumCasesShipped" Value="100"/>
    </DASExternalAppointmentLine>
```


These modes are described in the graphic and table below. Depending on the mode specified, the API processes new and existing POs differently and updates or deletes the PO lines that already exist in the system and are specified in the input XML ("common" PO lines).



| Mode | Common Lines | New Lines | Existing Lines Not Found in Input |
|------------------------------------|--|--------------------------|-----------------------------------|
| UpdateCommon (default) | Updated (Deleted if Action=Delete specified) | Not added | Left unchanged |
| UpdateCommonAddNewDeleteOld | Updated (Deleted if Action=Delete specified) | Added to the appointment | Deleted from the appointment |
| UpdateCommonAddNew | Updated (Deleted if Action=Delete specified) | Added | Left unchanged |
| UpdateCommonDeleteOld | Updated (Deleted if Action=Delete specified) | Not added | Deleted from the appointment |

ExtDocControlID Now Supported at Line Level

The ExtDocControlID can now be specified at the line level of the input XML to assist with testing and diagnostics. Previously, if an issue occurred at the line level, support had difficulty telling which line element was the problem.

Identifying Externally Submitted Appointments in the User Interface

Appointment requests that have been externally submitted or updated are identifiable on the **Appointment Details** page, **Appointment History** list page and appointment request list pages using the following fields. These fields are only displayed if the **Allow External Appointment Requests (API calls)** setting is enabled on the **Global Settings** page.

- The External ID field on the **Appointment Details** page

Dock Appointments / Appointment Details - Approval# 2610522

Appointment Details | Appointment History

UPDATE RE-SUBMIT CANCEL CHECK IN/OUT DELIVERY FAILURE RESCHEDULE

Track as hot appointment Yard Drop

Status: Approved Reason Code:

Appointment Date/Time: 10/6/2017 7:00 AM (00:45) Door(s): W110

Approval Number: 2610522 Approved By: DA Admin

Request Number: 1610522 Requested By: DA Admin

External ID: 422858

Requested Date/Time: 10/6/2017 7:00 AM SUGGEST Estimated Unload Time: 00hr 40m could be inaccurate due to insufficient data

Trailer #: Select Equipment Type... Routing #:

Trailer Arrived: Trailer Departed:

- The External ID and Externally Submitted columns on the **Appointment History** list page. The Externally Submitted column displays a checkmark if an appointment has been externally submitted or updated.

Dock Appointments / Appointment History - Approval# 2610522

Appointment Details | **Appointment History**

Request #: 1610522, Created By: DA Admin, Requested By: DA Admin, Approval #: 2610522, A

| Status | Status Code | External Request | External ID | Saved On | Last Modified On |
|--------|-------------|------------------|-------------|--------------------------|----------------------|
| | Approved | ✓ | 422858 | 10/2/2017 1:05:19 PM GMT | 10/2/2017 9:05:19 AM |

- The External ID and Externally Submitted columns on all appointment request list pages. The Externally Submitted column will display a checkmark if an appointment has been externally submitted or updated.

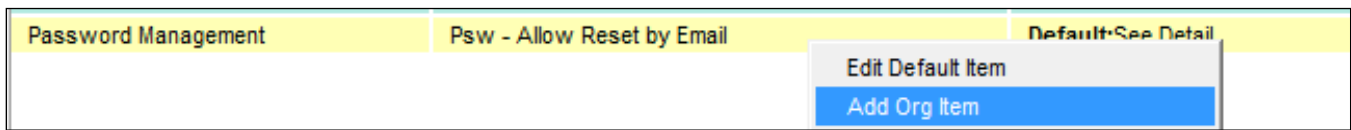
| Dock Appointments / Approved Appointments | | | | | | | | | |
|---|-----|------------|-----------|---------------------------|-------------------|-----|------------------|-------------|-------------|
| Dashboard Standing Created (Draft) Submitted Refused/Cancelled Approved Arrived Departed Delivery Failure Search Results | | | | | | | | | |
| Status | Hot | Approval # | Request # | Appointment Time | Requested Time | OOS | External Request | External ID | Reason Code |
| | | 2610525 | 1610525 | 10/6/2017 7:00 AM (00:45) | 10/6/2017 7:00 AM | 0 | ✓ | 422858 | |
| | | 2610522 | 1610522 | 10/6/2017 7:00 AM (00:45) | 10/6/2017 7:00 AM | 0 | ✓ | 422858 | |

Appendix D: Resetting a User Password by Email

Users can configure an email address on the **User Profile** page used to request a temporary password when their password is lost or forgotten. This feature must be set up by a Sec Admin user as described below.

Configuration

The **Psw – Allow Reset by Email** profile item must be set to **Yes** at the organization level by the Sec Admin user by navigating to **Setup > Profile Items** and selecting **Add Org Item** from the right-click menu.



Profile Item

Profile Key:

Value: ▼

When this functionality is enabled, a new field will be displayed on the **User Profile > Preferences** page, E-Mail Address for Resetting Password. This value is the email address a user will need to provide when requesting a temporary password.

The screenshot shows a web browser window titled "Profile / User Profile" with a sub-header "User Profile". At the top right of the window are "SAVE" and "CLOSE" buttons. The main content is divided into two sections: "Preferences" and "Font Preferences".

Preferences:

- Currency: [Dropdown]
- Date/Time Format: D-MMM-YYYY [Dropdown]
- Week Format: Sunday - Saturday [Dropdown]
- Language: English [Dropdown]
- Measurement System: US (British Imperial System) [Dropdown]
- Time Zone: [Dropdown]
- Email Address: xxx@descartes.com [Text Input]
- E-Mail Address for Resetting Password: xxx@descartes.com [Text Input]

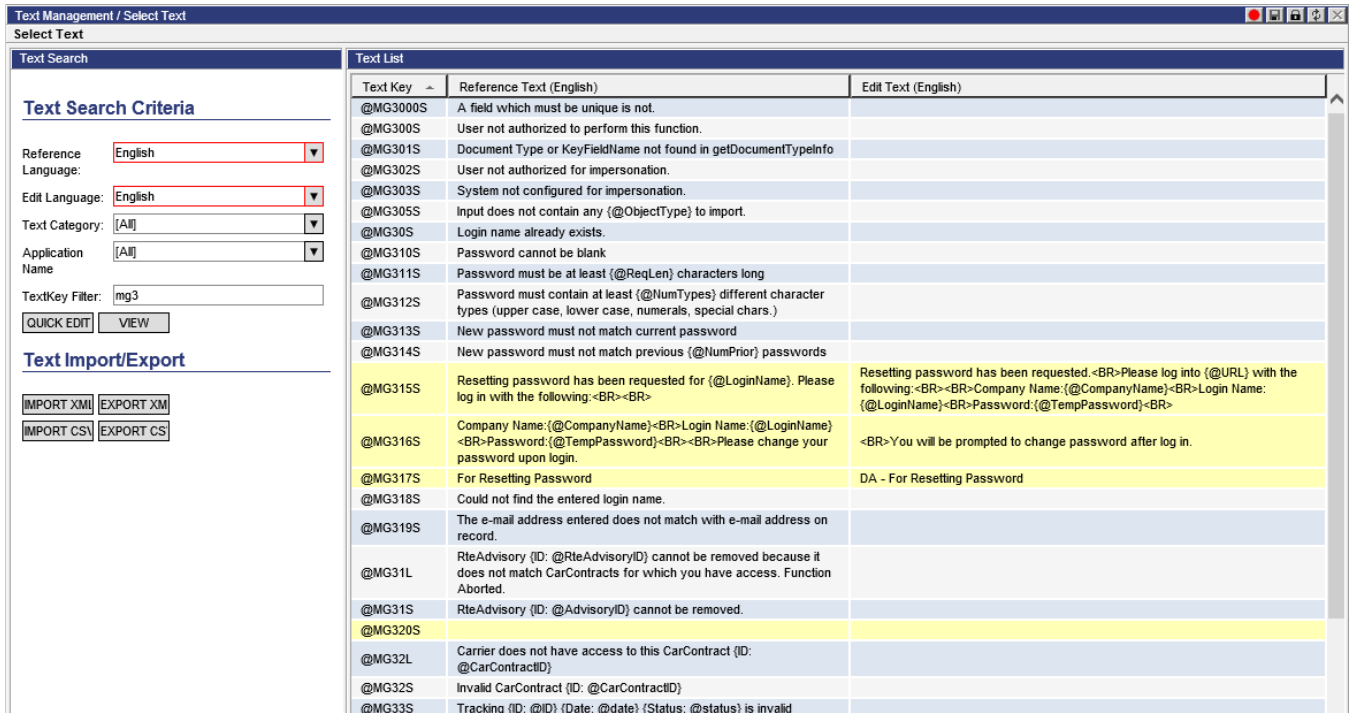
Font Preferences:

- Screen Font: 12 [Dropdown] Arial [Dropdown]
- Sample Text: ABC | xyz | 测试 | áááááç [Text Box]

Customizing Emails with Text Keys

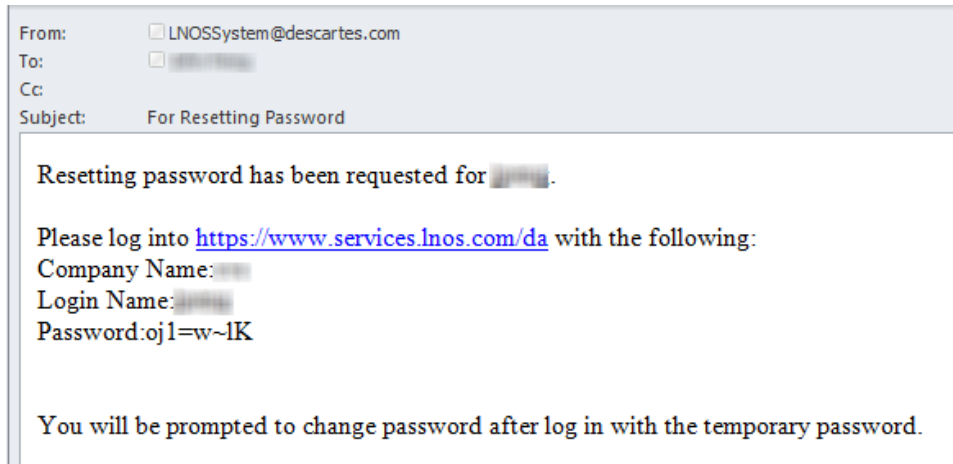
Sec Admin users can use text keys to customize the message sent to users after a password is reset. To edit the email message, select **Setup > Text** from the main menu. The **Select Text** page appears.

In the **Text Search Criteria** pane, select the **Back-end Messages** option from the **Text Category** dropdown and filter for the @MG315S, @MG316S and @MG320S text keys. All three text keys can be used to compose the email message.



These text keys support four parameters: {@CompanyName}, {@LoginName}, {@TempPassword} and {@URL}. The e-mail's subject line can also be customized by the @MG317S text key.

If the {@URL} parameter is specified in a text key, it will be substituted with the URL of the website on which the user clicked the **Forgot Password?** link to reset a password. For example, if the user clicked **Forgot Password?** from <https://www.services.lnos.com/da> and the {@URL} parameter was specified in the text key, the resulting email would provide a link to <https://www.services.lnos.com/da>.



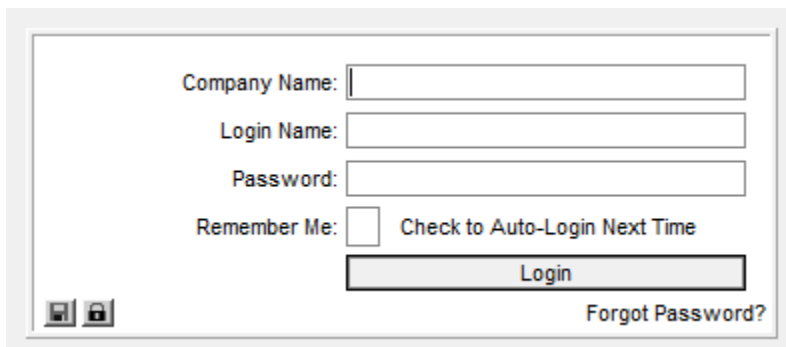
Please note the following when editing text keys:

- Each text key has a character limit of 256.
-
 can be entered to create a newline in the message.

Resetting a Password

To recover a password:

- 1 Click the **Forgot Password?** link on the login page.



The **Recovery Options** window appears.

- Enter the email address provided in the E-Mail Address for Resetting Password field previously and click **Send**. The system will attempt to find the user that matches the email address, using the optional Company Name and Login Name values in the search as well if they are provided on the **Recovery Options** window.

If found, the Company Name, Login Name and a temporary password is sent to the user's email.

- Log in using the temporary password provided. The system will prompt the user to set up a new password for his or her account.

Alternatively, if the user enters the correct Company Name and Login Name before clicking the **Forgot Password** link, the system will attempt to find any recovery options the user had set up previously and display these options in the Reset by Recovery Q&A section of the resulting **Recovery Options** window.

For example, if the user had set up a security question and answer previously, the security question will appear in the **Recovery Options** window, allowing him or her to enter a new password by providing the correct recovery answer.

- ➔ **Note**— If the user does not enter an email address in the E-Mail Address for Resetting Password field on the **User Profile > Preferences** page, the Reset by E-mail section will not be displayed.
- ➔ **Note**— Inactive users will receive the following error message when attempting to reset their password by email.

Appendix E: Text-Key Definitions

This section provides definitions and default values for text-keys used by different features in Descartes Dock Appointments Scheduling. This section does not provide a comprehensive list as of this version.

Text-Keys Related to Exclusive Destinations

Configuration specialists can use text-keys to customize the "Exclusive Destination" feature. These text-keys are listed below. For more information on this feature, please see the [Managing Exclusive Destination DCs \(Template-C\)](#) section.

@DALBExclusiveDestinationCL

Default value: "Exclusive Destination:"

This text key is the label used for the checkbox on the **Distribution Center Details** page.

@DAMsgExclusiveDCDuplicateCode1

Default value: "This DCs marked as "Exclusive Destination". It cannot share the PO Delivery Location code (VIZ) with any other DC. The "%1" DC is already using code "%2"."

This text key is a format string for the error message displayed at the top of the **Distribution Center Details** page when a user attempts to save a DC marked as an "exclusive destination" with a PO Delivery Location Code used by another DC in the system. Before displaying the error message, the **%1** placeholder is populated with the name of the DC already using the code and the **%2** placeholder is populated with the code value.

@DAMsgExclusiveDCDuplicateCode2

Default value: "The "%1" DC is set as "Exclusive Destination". It is already using PO Delivery Location Code (VIZ) "%2"."

This text key is a format string for the error message displayed at the top of the **Distribution Center Details** page when a user attempts to save a DC that is *not* marked as an "exclusive destination" with a PO Delivery Location Code used by another DC in the system that *is* marked as an "exclusive destination". Before displaying the error message, the **%1** placeholder is populated with the name of the DC already using the code and the **%2** placeholder is populated with the code value.

@DAMsgExclusiveDCDuplicateCode3

Default value: "DCs with duplicate "PO Delivery Location Code (VIZ)" are detected: %1.\nContact DC admin to report the issue".

This text is displayed as a popup error message during PO validation when multiple DCs have been found in the system that match the POs' specified destination and at least one of the DCs is marked as an "exclusive destination".

@DAMsgIncorrectDCForExclusivePO

Default value: "ERROR: PO can be send to "%1" ONLY!"

This text is displayed in the tooltip for the "incorrect exclusive destination DC" validation error when users hover the mouse cursor over the validation code column (!) in the PO entry section of the **Create Appointment Request** and **Appointment Details** pages.

@DAMsgIncorrectDCForPO

Default value: "WARNING: PO is addressed to "%1""

This text is displayed in the tooltip for "incorrect destination DC" when users hover the mouse cursor over the validation code cell (!) in the PO entry section of the **Create Appointment Request** and **Appointment Details** pages.

@DAMsgExclusive

Default value: "EXCLUSIVE"

This text is added next to the DC name in the popup warning message to notify the user that the PO is addressed to a DC marked as an "exclusive destination".

@DAMsgPOsWithInvalidDestinationDetected

Default value: "These PO(s): %1 cannot be delivered to %2".

This is the error message displayed at the top of the **Create Appointment Request** and **Appointment Detail** pages when a user attempts to save an appointment containing POs addressed to another DC marked as an "exclusive destination".

Text-Keys Related to PO Validation Codes

The client's security administrator can also control which PO validation codes and PO Delivery Date validation codes are acceptable for manual approval. By default, the validation code "0" (PO is GOOD) is the only acceptable code for the PO validation, while validation codes 101, 200, 300 and 301 are acceptable codes for PO Delivery Date validation. These codes are described in further detail below.

The client administrator can override these default acceptable codes by assigning client-specific text to the **@DAMsgAcceptablePOValidationCodes** and **@DAMsgAcceptablePODateValidationCodes** text-keys. The following format shall be used:

- **@DAMsgAcceptablePOValidationCodes:** Comma-separated list of elementary (single-bit) PO validation codes acceptable for manual approval (as a power of

two numbers), e.g. 1, 2, 4, 8, ... 512, 1024, 2048 etc. Please note that the [WarningCodeBM] field is a bitmap which can potentially contain multiple error conditions for PO validation. For example, a client may have code 4098 assigned to a PO. Code "4098" is a combination of the following validation codes:

- **Code 2:** Cases entered are greater than cases ordered
- **Code 4096:** PO is scheduled for another DC

To be accepted for manual approval, all PO error conditions (elementary codes) must be listed in the **@DAMsgAcceptablePOValidationCodes** text-key. Using the example provided above, entering "2,4096" would allow for the manual approval of such appointment requests.

- **@DAMsgAcceptablePODateValidationCodes:** A comma-separated list of PO STA validation codes acceptable for manual approval. This list has the following possible values:
 - **-1000:** No validation possible. Requested Date is not set.
 - **-1001:** Unable to validate. appt.Requested Date is set, but some PO level dates are not.
 - **100 [RED]:** requestedDate < firstReceiptWithToleranceDate (too early)
 - **101 [ORANGE]:** firstReceiptWithToleranceDate = requestedDate < firstReceiptDate (early)
 - **200 [GREEN]:** firstReceiptDate <= requestedDate <= lastReceiptDate (OK)
 - **300 [YELLOW]:** LastReceiptDate < requestedDate < LastBillDate (somewhat late)
 - **301 [ORANGE]:** LastBillDate < requestedDate <= LastReceiptWithToleranceDate (late)
 - **302 [RED]:** requestedDate > LastReceiptWithToleranceDate (too late)

By default, the orange (101, 301), green (200) and yellow (300) codes are acceptable for manual approval.

Text-Keys Related to Standing Shell Auto-Generation

Configuration specialists can use text-keys to customize the "Exclusive Destination" feature. These text-keys are listed below. For more information on this feature, please see the [Managing Exclusive Destination DCs \(Template-C\)](#) section.

Global Settings Form

| Text-Key | Default Value |
|---------------------------------|---|
| @DALBAutoGenerateStandingShells | "Auto-Generate Standing Shells" |
| @DaMsgNumberOfDaysInvalid | "Number of days must be a positive number no greater than 365" |
| @DALBNumDayOutGenRecAppts | (Existing text-key, changing default value) "Maximum Number of Days Out to Generate Standing Shells (No more than 365, Default: 120)" |

Appointment Details (Standing Appointment)

| Text-Key | Default Value |
|---|--|
| @DaMsgStandingAppointmentNumberOfDaysNotice | "days out into the future (cannot be more than %1)" |
| @DaMsgStandingAppointmentEndingDateNotice | "or for up to %1 days into the future (whichever comes first)" |
| @DaMsgStandingAppointmentTimeDurationNotice | "Standing shells scheduled at %1 for (%2) hours" |
| @DALBGenerateStandingTimeDuration | "Time/Duration:" |
| @DALBGenerateStandingShellsStartDate | "Starting Date:" |
| @DALBGenerateStandingShells | "Generate standing shells " |
| @DALBGenerateStandingShellsFor | "for" |
| @DaMsgStandingShellsNumberOfDaysInvalid | "Number of days to generate standing shells for must be no greater than %1 (set at Global Settings)" |
| @DALBGenerateStandingShellsForDaysOut | "days out into the future ()" |

Text-Keys Related to Cut-Off Time Functionality

Configuration specialists can use text-keys to customize the Cut-Off time feature. These text-keys are listed below. For more information on this feature, please see the *Managing Exclusive Destination DCs (Template-C)* section.

| Text-Key | Default Value |
|--|--|
| @DALB.DC.Autoschedule.CutOffTime | "Approved appointment changes cut-off time (in minutes):" |
| @DAMsgTryingToResubmitWithinCutOffTime | <p>"Appointment Re-Submission is not allowed with less than %1 before the appointment time.\nCurrent DC time: %2.\nApproved appointment time: %4.\nTime Zone: %3\nYou have to contact DC directly"</p> <ul style="list-style-type: none"> • %1 is replaced with the cut-off time window size (converted to 'X hrs Y min' format) • %2 is replaced with the DC local time • %3 is replaced with the DC time zone • %4 is replaced with the appointment time (in DC time zone) |
| @DAMsg.HoursAndMinutes | "%1 hrs %2 min" |
| @DAMsg.HoursAndMinutes.HoursOnly | "%1 hrs" |
| @DAMsg.HoursAndMinutes.MinutesOnly | "%1 min" |
| @DAMsgTryingToCancelWithinCutOffTime | <p>"Approval# %1: cannot cancel with less than %2. DC time: %3. Appointment time: %5. Time zone: %4"</p> <ul style="list-style-type: none"> • %1 is replaced with approval number of an appointment • %2 is replaced with string representation of the cut-off time window • %3 is replaced with the DC local time • %4 is replaced with the DC time zone • %5 is replaced with the appointment time |

Text Keys Related to Appointment Merge Functionality

Configuration specialists can modify the label of the **Enable Appointment Merge** global setting. For more information on the appointment merge functionality,

| Text-Key | Description |
|----------------------------|---|
| DALBEnableAppointmentMerge | "Enable Appointment Merge (when user submits an outdated version of the appointment)" |

Text Keys Related to Party Admin User Messages

Configuration specialists can modify the messages displayed when a party admin user attempts to create a user without specifying a username or attempts to remove their own account from the party.

| Text-Key | Description |
|----------------------------|---|
| DAMsg.UserIsRequired | "Select user or create a new one" |
| DAMsg.CannotDeleteYourself | "You cannot delete yourself from the party" |

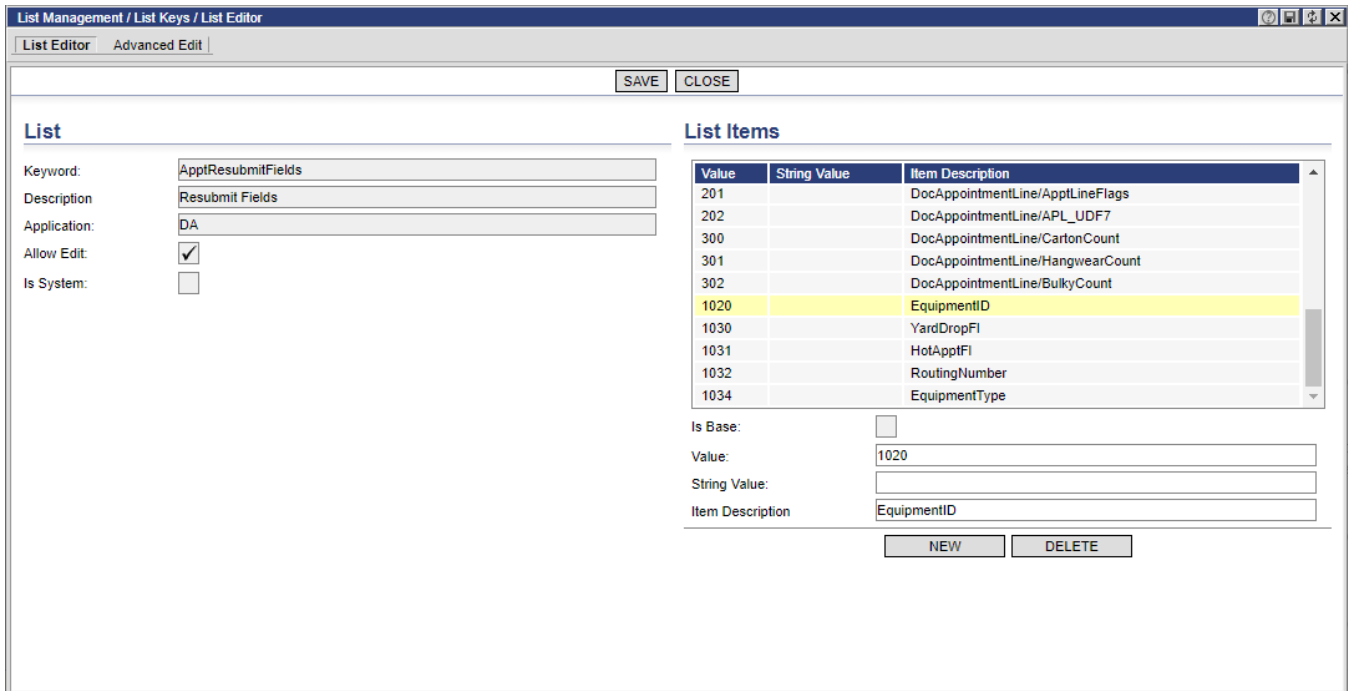
Appendix F: Configuring Approved Resubmission Functionality

This section details how implementation specialists can configure fields and warning messages for the approved appointment resubmission functionality. You can find details on this feature in the [Updating Approved Appointment Requests](#) section.

Configuring Critical Fields and Non-Critical Fields

Because different clients may have different fields they consider critical to operations for an approved appointment, SecAdmin users can configure which fields on the **Appointment Details** page will trigger a warning dialog when changed (non-critical) and which fields will trigger a warning dialog and the resubmission of the appointment when confirmed (critical).

The configuration is done from the new **ApptResubmitFields** system list, accessible via **Setup > List Editor**. The SecAdmin can add or remove critical fields from the List Items section of the **List Editor** page or via the **Advanced Edit** tab. The critical status of each field can only be modified from the List Items section.



- To set a field as critical, the Value field of the list item must be less than 1000. Fields with values greater than or equal to 1000 are non-critical. Value entries must be an integer and unique within the list.
- The String Value field must be left blank.

- The Item Description field refers to the field name as it is specified in the page XSL of the corresponding Descartes Dock Appointments Scheduling template.
 - ➔ **Note**— The appointment line field must be prefixed with "DocAppointmentLine/", e.g. **DocAppointmentLine/NumCasesShipped**

The [Customizing Warning Message Templates](#) section below details how to add a text-key to provide user-friendly field names in the actual warning messages displayed to the end user.

Customizing Warning Message Templates

To quickly summarize, the system uses fields on the **ApptResubmitFields** list to check if any critical changes were made to an approved appointment and the appointment must be resubmitted as a result. There are several possible outcomes of this validation. Each will be reported to the user as a popup message using one of the following templates:

Appointment Version Conflict Message Template

If the appointment was updated by other users on the server-side while the current user was working on the same appointment, the system will not allow any changes to be made. The following message is displayed in a confirmation dialog:

| Text-Key | Description |
|--|--|
| @DAMsgResubmit.AppointmentModifiedOnServerSide | ="This appointment has been updated by %5 on %6 (local DC time) after you opened it. You have to refresh the screen before making any changes. Do you wish to refresh now?" %5 is replaced with the name of the user who has last modified the appointment. %6 is replaced with the date /time of the most recent appointment update |

Critical Field Change Message Templates

One or more fields marked critical in the **ApptResubmitFields** list have been modified in the client-side version of the approved appointment. One of the following messages could be customized and displayed in a confirmation dialog, depending on the individual case and the client's desired configuration.

- Header-level supplier changed for the appointment approved using the standing shell allocated for the supplier:

| Text-Key | Description |
|----------|-------------|
|----------|-------------|

@DAMsgResubmit.SupplierChangedForStandingAppointment

"The Appointment has to be Re-Submitted because the Supplier has been changed for the appointment approved using suppliers standing shell. Do you wish to continue?"

- Header-level carrier changed for the appointment approved using standing shell allocated for the carrier:

| Text-Key | Description |
|---|--|
| @DAMsgResubmit.CarrierChangedForStandingAppointment | "The Appointment has to be Re-Submitted because the Carrier has been changed for the appointment approved using carriers standing shell. Do you wish to continue?" |

- Number of appointment lines is different between server and client

| Text-Key | Description |
|--|--|
| @DAMsgResubmit.NumberOfPOLinesHasChanged | "The Appointment has to be Re-Submitted because the number of PO line items has changed. Do you wish to continue?" |

- New PO Number added to the appointment

| Text-Key | Description |
|-----------------------------------|---|
| @DAMsgResubmit.PONumberHasChanged | "The Appointment has to be Re-Submitted because the new PO#: %2 found in the appointment. Do you wish to continue?" |

Note— A case where a PO Number is removed is not provided here because when a PO Number is removed, the system detects the modification as either a change to the number of appointment lines (if no other lines were added) or a "new PO detected" (e.g., if the PO Number was removed and another was added instead or, if the PO Number was changed for the appointment line, so the number of appointment lines did not change).

- When one of the fields specified in the **ApptResubmitFields** list is changed (comparing to the value on the server-side), then one of the two following generic messages is shown:
 - This template is used for a header-level message:

| Text-Key | Description |
|------------------------------|---|
| @DAMsgResubmit.GenericHeader | "The Appointment has to be Re-Submitted because \'%1\' has been changed from \'%3\' to \'%4\''. Do you wish to continue?" |

- This template is used for an appointment line-level field:

| Text-Key | Description |
|------------------------------|--|
| @DAMsgResubmit.GenericPOLine | "The Appointment has to be Re-Submitted because \'%1\' has been changed from \'%3\' to \'%4\' for PO#: %2. Do you wish to continue?" |

Non-Critical Field Change Message Templates

One or more non-critical fields have changed on the approved appointment. No resubmission is necessary, but a warning message is displayed in a confirmation dialog. Like the previous options provided, this message can be customized.

- The following warning message is displayed when the user adds a new appointment comment to the list of comments (under the Ship To area of the **Appointment Details** page).

| Text-Key | Description |
|---|--|
| @DAMsgResubmit.NewAppointmentCommentAdded | "You have added a new comment. Note, this is not resubmitted to DC for review. If you feel the DC needs this information before unloading the appointment please contact them directly using the email address under "Ship To" area" |

- When one of the fields specified in the **ApptResubmitFields** list as a non-critical field is changed (comparing to the value on the server-side) then one of the two following generic messages is displayed.
 - This template is used for a header-level field:

| Text-Key | Description |
|-------------------------------------|--|
| @DAMsgResubmit.GenericWarningHeader | "You have changed a \'%1\. Note, this is not resubmitted to DC for review. If you feel the DC needs this information before unloading the appointment please contact them directly using the email address under "Ship To" area" |

- This template is used for an appointment line-level field:

| Text-Key | Description |
|-------------------------------------|---|
| @DAMsgResubmit.GenericWarningPOLIne | "You have changed a \'%1\ for PO#:%2. Note, this is not resubmitted to DC for review. If you feel the DC needs this information before unloading the appointment please contact them directly using the email address under "Ship To" area" |

Message Template Parameters

The following parameters are passed for the message templates described in the [Customizing Warning Message Templates](#) section above:

- **%1** fieldName (refer to the FIELD NAMES section below)
- **%2** poNumber (business key for the appointment line)
- **%3** oldValue (converted according to user preferences)
- **%4** newValue (converted according to user preferences)
- **%5** other username (used only with the @DAMsgResubmit.AppointmentModifiedOnServerSide text-key)
- **%6** last modification date (used only with the @DAMsgResubmit.AppointmentModifiedOnServerSide text-key)

If the oldValue or newValue is NULL (on the server-side or client-side) then its value is shown in the message template as follows:

```
<ExtTextKey TextKey="@DAMsgResubmit.NoValue" Description="-blank-"
```

Customizing Fields Names in Generic Error/Warning Messages

Use the following text-keys to change the field names used in the message templates provided above to match the field names used by individual clients.

| Text-Key | Description |
|---|----------------------------|
| @LKApptResubmitFields.RequestedDT | "Requested Date" |
| @LKApptResubmitFields.YardDropFl | "Yard Drop" |
| @LKApptResubmitFields.HotApptFl | "Track As Hot Appointment" |
| @LKApptResubmitFields.RoutingNumber | "### Routing #" |
| @LKApptResubmitFields.EquipmentID | "Trailer Number" |
| @LKApptResubmitFields.EquipmentType | "Trailer Type" |
| @LKApptResubmitFields.ContainerNumber | "Intl. Container #" |
| @LKApptResubmitFields.UnloadMethodType | "Unload Method" |
| @LKApptResubmitFields.OverrideTotalCartons | "Total Cartons" |
| @LKApptResubmitFields.OverrideTotalPallets | "Total Pallets" |
| @LKApptResubmitFields.OverrideTotalHangwear | "Total GOH" |
| @LKApptResubmitFields.OverrideTotalBulky | "Total Bulky" |
| @LKApptResubmitFields.NumCasesShipped | "Cases" |
| @LKApptResubmitFields.ItemQty | "Pallets" |
| @LKApptResubmitFields.ApptLineFlags | "FLR/PLT" |
| @LKApptResubmitFields.APL_UDF7 | "Comment" |
| @LKApptResubmitFields.CartonCount | "Loose Cartons" |
| @LKApptResubmitFields.HangwearCount | "GOH" |
| @LKApptResubmitFields.BulkyCount | "Bulky" |
| @LKApptResubmitFields.AddlNotes | "Additional Note" |

Customizing New Fields Added to the ApptResubmitFields List

If you want to add a field to the **ApptResubmitFields** list, you can import the following new text-key to make the field name adjustable in the error/warning message template:

```
@LKApptResubmitFields.<new field name>
```

For example, if you add the DocAppointmentLine/APL_UDF28 field to the **ApptResubmitFields** list, then the XML provided below should be imported into the security database by an admin user via the Import Text page in DCF.

```
<parmExtTextKey>  
<ExtTextKey TextKey="@LKApptResubmitFields.APL_UDF28" Description="Order  
Type" Category="5">  
<CtyText LangCode="1" TextKey="@LKApptResubmitFields.APL_UDF28" Text="Order  
Type" AccountID="0" RealmID="0" GroupID="0" UserID="0"/>  
</ExtTextKey>  
</parmExtTextKey>
```

➡ **Note**— The text-key is formed by concatenating the "@LKApptResubmitFields" string with the field name only (the DocAppointmentLine path is not used).

Appendix G: Configuring Fields Via SELECT Profile Items (Template-M)

This section provides information for implementation specialists on how to configure and customize fields on the **Appointment Details** page via the SELECT profile items in Template-M.

Configuring Required Fields for Selected Purchase Orders

For Template-M of Descartes Dock Appointments Scheduling, configuration specialists can set certain fields on the **Create Appointment Request** and **Appointment Details** pages as required for particular POs by PO number. For example, configuration specialists could set the Pallets override field as required when users add X-Dock POs to an appointment.

Create Appointment Request

SAVE DRAFT APPROVE SUBMIT CANCEL

OverrideTotalPallets is required

Use standing appointment
 Standard appointment

Track as hot appointment
 Multiple suppliers

Appointment Date: _____
 Dock Number: _____

Carrier: **DSG Carrier (DSGT) - DSGT**
 Supplier: **DSG SUPPLIER 1 (TEST1) - TEST SUPPLIER 1**
 Requested Date: **6-OCT-2017 10:30**
 Unload Method: **Rigid Rear Unload**

Trailer Regn. #: _____
 Int'l. Container #: _____
 Additional Note: _____
 Product Type: _____

Address: main street, City, AU

| Hot | PO # | ASN # | Supplier # | Supplier Name | Comments | Loose Cartons | GOH | Bulky | Order Type | Class Group | EQ Order Type | Ad Date |
|-----|-----------------|------------------|------------|-----------------|----------|---------------|-----|-------|------------|-------------|---------------|------------|
| * | TEST_PO_3013693 | TEST_BOL_3013693 | TEST1 | TEST SUPPLIER 1 | | 3 | 2 | 2 | BOL_UDF8 | 2 | BOL_UDF7 | 1-APR-2014 |

PO #: TEST_PO_3013693 , ASN#: TEST_BOL_3013693, SSCC Qty: 3C 2B 2H
 ASN #: TEST_BOL_3013693 , PO#: TEST_PO_3013693, SSCC Qty: 3C 2B 2H
 Supplier Name: TEST SUPPLIER 1
 Order Type: BOL_UDF8
 Class Group: 2
 EQ Order Type: BOL_UDF7
 SSCC Qty: (XDock Sorter: Cartons) **3** Loose Cartons **2** GOH **2** Bulky Hot Item
 Ad Date: 1-APR-2014

The **DA.Validate.Select1** and **DA.Validate.Select3** profile items are used to retrieve PO/ASN details for appointment requests (**DA.Validate.Select3** for clients using Multiple PO Entry). These profile items can be modified to return the, **FieldsToMakeRequired** field. This field is optional per implementation; it may only be present for certain clients. The **FieldsToMakeRequired** field returns a list of field names from the page XSL in a comma-separated list. For example:

'OverrideTotalPallets,ContainerNumber' AS FieldsToMakeRequired

Please note the following regarding this functionality:

- The maximum length of the **FieldsToMakeRequired** field is 256 characters.
- If a field is set as required by at least one PO on the appointment, then the field will be required on the appointment request pages. When a new PO is added to

the appointment that sets a field on the appointment request pages as required, then the field will be rendered as a required field (red bordered).

- When an appointment request is saved, the FieldsToMakeRequired list is saved into a corresponding field in the MonAppointmentLine database table. This ensures that when the appointment is reopened, the required fields are retained.
- If a field is already set as required in the page XSL, adding such a field to the FieldsToMakeRequired field will have no effect.

Customizing the Validation Message

The corresponding validation message displayed at the top of the **Create Appointment Request** and **Appointment Details** page can be customized for each required field using the **@DAMsg.Required.<fieldName>** text-key, where <fieldName> is the name of the field made required by the DA.Validate.Select1 profile item. This text-key allows configuration specialists to return a more informative message to users if they attempt to save an appointment request without populating the required field.

For example, if a client set the Override Total Pallets field as required, a configuration specialist could import the **@DAMsg.Required.OverrideTotalPallets** text-key into the system with a default message set to the following: "Number of pallets is required when PO contains X-Dock items".

- ➔ **Note**— The corresponding **@DAMsg.Required.<fieldName>** text-key must be manually imported into the system by an administrator before custom text can be assigned to it.

Configuring Read-only Override Fields for Selected Purchase Orders

For Template-M of Descartes Dock Appointments Scheduling, configuration specialists can set the header-level override fields (Cartons, GOH, Bulky) as read-only on the **Create Appointment Request** and **Appointment Details** pages based on particular PO (ASN) numbers. For example, configuration specialists could set the Bulky and GOH override fields as read-only for appointments that contain certain POs.

The **DA.Validate.Select1** and **DA.Validate.Select3** profile items are used to retrieve PO/ASN details for appointment requests (**DA.Validate.Select3** for clients using Multiple PO Entry). These profile items can be modified to return an optional field, `DisableQuantityOverride`. This field is a bitmask which controls which header-level override fields should be read only. The meaning of the bits in the bitmap is as follows:

- **1** - Cartons
- **2** - GOH
- **4** - Bulky

Any combination of bits can be sent back from the recordset created by the `DA.Validate.Select1` SQL statement to control these fields. For example, to set all three fields as read-only for a given PO, a decimal value of "7" should be returned (0x00000111). To set the GOH and Bulky fields as read-only, a decimal value of "6" should be returned (0x00000110). To set only the Cartons field as read-only, a decimal value of "1" should be returned (00000001).

Please note the following regarding this feature:

- It is not required that all POs have this bitmask specified to disable these fields. If there is at least one PO on the appointment that is configured to set the

Carton, GOH or Bulky field to read-only, the field(s) will be read-only on the appointment request pages.

- When a new PO is added to the appointment that sets the Carton, GOH or Bulky fields on the appointment request pages as read-only, then the field will be rendered as a read-only field.

Adding NumCasesShipped Field to Appointment Form Via Profile Item

For clients using Template-M, the **DA.Validate.Select1** and **DA.Validate.Select3** profile items can be modified to return an optional field, NumCasesShipped, allowing users to specify the number of cases shipped on the appointment. This field appears in addition to the NumCasesOrdered and DeliveredPOCount fields, which are read-only when the **Allow Override Line Level Quantities** global setting is enabled in Template-M.

| ! | Hot | PO # | Supplier # | Supplier Name | Comments | Qty Ordered | Qty Delivered | Qty | Order Type | N/A | N/A | PO Delivery Date |
|---|-----|------------|------------|---------------|----------|-------------|---------------|------|------------|-----|-----|------------------|
| * | | 4505844917 | | INDUSTRIAL | | 1502 | 0 | 1502 | SA | 0 | 0 | 12/19/2017 |

PO #: ; Est Del Date: 19 Dec 2017; Units: 1502; Delivered: 0

Supplier Name: N/A:

Order Type: N/A:

Units: Hot Item PO Delivery Date:

Ordered: Delivered: Qty

Comments:

If no value is returned for this field in the recordset, the value is defaulted to the difference between the NumCasesOrdered and DeliveredPOCount values [(NumCasesOrdered) – (DeliveredPOCount) = (NumCasesShipped)].

Validation is performed on the NumCasesShipped field to ensure that the quantity does not exceed the remaining PO quantity.

Configure Parameterized and Text-key Translatable [Comment] Field

To ease the implementation process for Professional Services when configuring the PO Validation functionality for new clients, Descartes Dock Appointments Scheduling supports parameterized, text-key-translatable comments. The fields described in the following sections can be included in the recordset returned by the SELECT1 and SELECT3 profile item SQL in Template-M.

Because the appointment line Comment field value is built dynamically based on Comment, CommentTextKey and/or CommentParam values in the recordset, a check has been added to help ensure that the resulting value is no longer than the maximum length of the appointment line Comment field (100 characters). The system will truncate this value if necessary to prevent potential issues.

Comment

This field contains the actual message or a message template with '~N' type of parameter placeholders to be used as an appointment line Comment. Please note that the [Comment] field syntax uses '~N' (tilde) type parameter placeholders to avoid interfering with the existing Profile Items parameter replacement functionality. This functionality is already using '%N' (percent) syntax.

For example, you may choose to include the following line into your SELECT1 profile item SQL:

```
'Cost:~1, Expiration Date: ~2' AS Comment,
```

Consequently, you may use '%N' type placeholders in the [Comment] field. These '%N' type placeholders will be replaced with the actual parameters used for profile item processing.

For Example, in the SELECT1 profile, the '%1' is replaced with the selected BoIID, and '%2' is replaced with the current appointmentID. If %1 or %2 is used in the [Comment] field as an explicitly hardcoded value, these placeholders are replaced with the selected BoIID and appointmentID respectively.

CommentTextKey

Use the CommentTextKey to customize the Comment message. If this text-key exists, the system uses it as the actual message or a message template containing a '~N' type of parameter placeholder. If this text-key does not exist, the [Comment] field is used as the default message text (or message template).

For example, you may choose to include the following line into your SELECT1 SQL:

```
'@DA.POValidationComment1' AS CommentTextKey,
```

The actual text associated with this text-key could be: "Cost:%1, Expiration Date: %2".

Note— When editing the text-key, '~N' type parameter placeholders must be used as they are in other areas of the application where text-key values are used as a formatting template.

If the Professional Services team decides to use text-key-based comments for a custom Descartes Dock Appointments Scheduling client implementation, the corresponding text-keys must be imported manually. The Descartes Dock Appointments Scheduling installer does not create these text-keys because they are client- and/or implementation-specific. In order to import text-key-based comments, login to the DCF user interface as the "admin" user, navigate to the **Import Text** tab and import the XML file containing the required text-keys.

Here is an example of text-key import file syntax:

```

<parmExtTextKey>
<ExtTextKey TextKey="@DA.POValidationComment1" Description="Cost: %1,
Expiration Date: %2" Category="5">
<CtyText TextKey="@DA.POValidationComment1" Text="Cost: %1, Expiration
Date: %2" LangCode="1" />
</ExtTextKey>
<ExtTextKey TextKey="@DA.POValidationComment2" Description="There is a
related PO Number: %1" Category="5">
<CtyText TextKey="@DA.POValidationComment2" Text="There is a related PO
Number: %1" LangCode="1" />
</ExtTextKey>
</parmExtTextKey>

```

CommentParam1, CommentParam2, CommentParam3, ...CommentParamN

The CommentParam parameters are used for placeholder replacement. Please consider the following examples to illustrate how these parameters work.

Example 1: Creating a parameterized, text-key-based comment

In the sample import provided in the previous section, the entire comment-related portion of the SELECT1 profile item SQL could look like the following:

```

'@DA.POValidationComment1' AS CommentTextKey,
'Cost: ~1, Expiration Date: ~2' AS Comment,
'$12.99/lb' AS CommentParam1,
'June 07, 2019' AS CommentParam2,

```

The resulting comment added to the appointment line will look like the following:
"Cost: \$12.99/lb, Expiration Date: June 07, 2019"

Example 2: Inserting Profile Item SQL Parameters into the comment

In the sample import provided in the previous section, the entire comment-related portion of the SELECT1 profile item SQL could look like the following:

```

'' AS CommentTextKey,
'Cost: ~1, Expiration Date: ~2, BOL ID:%1' AS Comment,
'$12.99/lb' AS CommentParam1,
'June 07, 2019' AS CommentParam2,

```

The resulting comment added to the appointment line should look like the following:
"Cost: \$12.99/lb, Expiration Date: June 07, 2019, BOL ID: 2006898"

- ➡ **Note**— If you want to include profile item parameters in the comment, the CommentTextKey field must not be used. The Comment field is ignored if a CommentTextKey value is present in the returned recordset and its value exists in the database. In this case, exclude the CommentTextKey from the returned recordset or pass a profile item parameter value as one of the CommentParam values.

Definition of PO-specific Date Range and Tolerance Level

The PO Validation functionality supports the definition of PO-specific delivery date ranges and tolerance levels. For clients using Template-M, the following new fields can be returned by the SELECT1 and SELECT3 profile items:

- **POToleranceEarly** (integer): specifies the number of days to accept a delivery early as an exception. Example: `30 AS POToleranceEarly`
- **POToleranceLate** (integer): specifies the number of days to accept a delivery as late as an exception. Example: `30 AS POToleranceLate`
- **FirstReceipt**: specifies the date to receive a delivery early. Example: `DATEADD(dd, -60, GETDATE()) AS FirstReceipt`
- **LastReceipt**: specifies the date to receive a delivery late. Example: `DATEADD(dd, 60, GETDATE()) AS LastReceipt`

The POTolerance fields establish the range for accepting a delivery as an exception. When POTolerance fields are specified for the PO Number and the appointment Requested Date falls within this range (from the [AD Date]-POToleranceEarly to [AD Date]+POToleranceLate), the AD Date field on the appointment line of the **Appointment Details** page will appear as a cell highlighted in yellow.

The First/LastReceipt fields establish the range for receiving a delivery on time. When First/LastReceipt fields are specified for the PO Number and the appointment Requested Date falls within this date range, the AD Date field on the appointment line of the **Appointment Details** page will appear as a cell highlighted in green.

Standardized 'Remaining Quantity' Calculation

As of version 19.06, when the **Allow Override Line Level Quantities** global setting is enabled (i.e., "Depletion Mode"), Remaining Quantity is calculated via a single SQL function (getAppointedAndDeliveredQuantityPerPO) called by the SELECT1 and SELECT3 profile items SQL *and* by the Descartes Dock Appointments Scheduling backend when an appointment is loaded in the user interface. This function has the following parameters:

- **PONumber**: The PO Number to analyze
- **AppointmentID** (optional): An appointment specified via the AppointmentID parameter will be excluded from counting the [NumCasesShipped] totals. This

parameter is used when calculating the Remaining Quantity for an existing appointment.

This feature helps the Appointed/Delivered Quantity to work consistently for newly added appointment lines where profile item SQL is used to collect data and for existing appointment lines initialized by the backend.

SupplierLocationID and UserID for Validation on Multiple PO Entry

Implementation specialists can include the header-level SupplierLocationID value and current user's UserID value in the SELECT3 Profile Item SQL to better validate PO numbers on the **Multiple PO Entry** page.

For appointments with a single supplier, this feature helps ensure that the PO belongs to the supplier or supplier location selected at the header level.

For appointments with multiple suppliers, this feature helps ensure that:

- When the PO number is validated by a carrier or DC user, the PO belongs to the supplier in a party relationship with the carrier and DC selected for the appointment
- When the PO Number is validated by a supplier user, the PO belongs to the same supplier party that the current user belongs to

Enable Supplier-Level Delivery Tolerance

For Template-M, the PO Early Tolerance and PO Late Tolerance fields on the **Supplier Details** page allow users to set a day range for acceptable delivery dates before and after the delivery date on a purchase order. These values override the PO Early/Late Tolerance values set for the "Ship to" distribution center.

For the system to use these values during PO validation, implementation specialists must also configure SELECT1 and SELECT3 profile items SQL to handle supplier-level tolerances. These profile items should be set to return the POToleranceEarly and/or POToleranceLate fields based on value in the MonAppointmentParty database table for the corresponding supplier. The profile item SQL can also be set to return tolerance values for individual POs instead of per supplier.

Additionally, the validation message returned when the PO Delivery Date/Appointment Requested Date validation is performed can be customized. Each message can include the following data:

- strFirstReceiptDate,
- strFirstReceiptWithToleranceDate,
- strLastReceiptDate,
- strLastReceiptWithToleranceDate,
- strLastBillDate,
- toleranceEarly,

- toleranceLate

Use the following text-keys to customize the tolerance message texts and colors. The table provides examples of how to define these parameters.

| Text-Key | Default Value |
|--|--|
| @DALBDeliveryDateValidationMessageNoValidation | "Appointment Requested Date is not set." |
| @DALBDeliveryDateValidationMessageTooEarly | "Rejected! Trying to deliver too early. \n\nThe earliest possible delivery date is %1" |
| @DALBDeliveryDateValidationMessageEarly | "Accepted as an exception! Trying to deliver early. \n\nThe first delivery date is %1" |
| @DALBDeliveryDateValidationMessageOK | "Accepted." |
| @DALBDeliveryDateValidationMessageAlmostLate | "Accepted with warning! Almost late. \n\nThe last delivery date for this PO is %1" |
| @DALBDeliveryDateValidationMessageLate | "Accepted as an exception! Trying to deliver too late. \n\nThe latest delivery date is %1" |
| @DALBDeliveryDateValidationMessageTooLate | "Rejected! Trying to deliver too late. \n\nThe latest possible delivery date is %1" |
| @DALBDeliveryDateValidationMessageUnableToValidate | "Insufficient Data - Unable to validate." |