

Vehicle Load Planning User Guide

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Vehicle Load Planning

The Trinity Vehicle Load Planning module provides functionality for the creation and management of delivery loads. Each load can consist of several sales order deliveries.

The main features of Load Planning are:

- The allocation of delivery routes and drop numbers to customer ship-to addresses
- The application of service level and regular delivery day information to the calculation of order delivery dates
- An overview of order delivery information that is summarised by date and delivery route – this is useful for planning load schedules
- A facility to attach delivery information such as delivery booking details and number of parcels to each delivery
- A facility to transfer bulk orders to invoices for a specified route
- A facility to create loads from deliveries and allocate loads to vehicles
- A facility to compare the weight and volume of a load against vehicle capacity
- A facility to auto-create loads for deliveries not assigned to a load
- The production of sales documents by load
- The production of consolidated picking tickets by load
- The production of a driver's load sheet which summarises delivery information
- Integration with Microsoft Dynamics™ GP Advanced Picking to print bulk picking lists by load

Service levels

Service levels represent the different types of delivery services you can offer customers, such as next day delivery, express delivery, or next day +1 delivery. Use the Service Level Maintenance window to create and edit service levels. Assign service levels to customer addresses in the Extra Address Information Maintenance window.

Vehicle and driver details

When a load is created, it can be assigned to a vehicle and a driver. Use the Vehicle Maintenance window to create and edit vehicle details. Each vehicle must be assigned a capacity weight and a capacity volume. These values are used to ensure that loads do not exceed the capacity of the vehicle. Assign weights and volumes to items in the Item U of M Load Details window.

Route descriptions

Route descriptions are used to categorize customer delivery addresses and help with the assignment of sales documents to different loads. Use the Load Schedule Route Maintenance window to create and edit route descriptions. Assign routes to customer addresses in the Extra Address Information Maintenance window, or assign a route to a document in the Document Delivery Details window.

Creating and maintaining loads

Edit the delivery details for a sales document in the Document Delivery Details window - *i.e.*, enter the number of parcels in the delivery, the delivery date, booking details, and a drop

number. Use the Documents Not Assigned to Loads window to view unassigned sales documents and access the Load Maintenance window, where loads are created, and documents are assigned to loads. Alternatively, automatically create loads using the Automatic Load Creation window.

View the load schedule in the Documents Assigned to Loads window. The load schedule is organized by site, ship date, load, and route description. Documents can be transferred between loads in the Load Header Maintenance window. While a load can be viewed by multiple users simultaneously, only one user at a time may edit loads. A warning is displayed if further users try to edit a load that is currently being edited.

When you create a new load number, a corresponding batch is created for the storing of load documents. Load number WAR 10, for example, would have a batch created called WAR/10. If documents are omitted from a load, they are stored in the default batch WAR/General.

Print a driver's load sheet with a summary of delivery information in the Load Schedule Prints window.

Integration with Microsoft Dynamics™ GP

The Vehicle Load Planning module is fully integrated with Microsoft Dynamics™ GP Advanced Picking to enable the printing of bulk picking lists by load. See Microsoft Dynamics™ GP Advanced Picking with Vehicle Load Planning for further details.

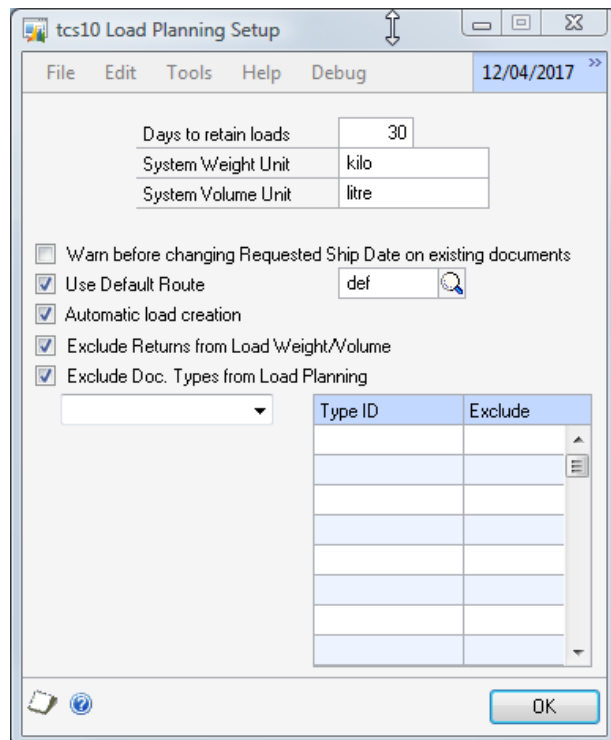
Setup

1. Load Planning Setup Window

Tools >> Setup >> Trinity >> Load Planning >> Setup

Use the Load Planning Setup window to:

- Set up Load Planning details



1.1 Setting up Load Planning Details

To set up load planning details in the Load Planning Setup window:

1. Enter a value in the Days to Retain Loads field. This value is used during load schedule purging.
2. Enter a unit of weight in the System Weight Unit field. This weight unit is used throughout load planning.
3. Enter a unit of volume in the System Volume Unit field. This volume unit is used throughout load planning.
4. If you amend the delivery address on a sales document, then this could lead to the requested ship date being automatically recalculated. Select the Warn Before Changing Requested Ship Date on Existing Documents option to receive a warning before requested ship dates on amended documents are recalculated.
5. If you select to Use Default Route, and the Requested Ship Date on a document is not a standard delivery day for the Ship to Address, the document is assigned to the route specified here as the Default Route.
6. Select Automatic Load Creation if you would like Fulfillment Orders and Invoices to be added to loads automatically. If this option is enabled, as documents are created, loads are generated automatically for each combination of site/route/requested ship date. Fulfillment Orders and Invoices are added to the load for the appropriate site, route, and requested ship date.

After the initial assignment, if the requested ship date or route is changed on a Fulfillment Order before it has been picked - i.e., if it has a status of Ready to Print Picking Ticket - it is automatically transferred to the appropriate load.

The load assignment on a Fulfillment Order of a more advanced status is not changed if its route or requested ship date is changed.

Note that changes to routes made through the Quick Route/Drop Maintenance by Document window or the Quick Route/Drop Maintenance by Customer and Address window does not result in load re-assignment.

7. Select Exclude Returns from Load Weight/Volume if you include Return documents on loads but would like the weight and volume of Return documents to be ignored when calculating the total weight and volume of the load.
8. Select Exclude Doc Types from Load Planning if you want to exclude some of your document types from the Load Planning system; for example, if you have a specific document type for orders which is collected by the customer.
9. If you have selected Exclude Doc Types from Load Planning, select a document type in the drop-down list. The associated Type IDs are displayed in the scrolling window, and you can select the ones that you want to exclude from load planning.

Note that to use this feature, you should exclude all the type IDs used in the lifetime of a document. For example, if you have a collection type order which is excluded from load planning, this should be transferred to a fulfillment order/invoice that is also excluded from load planning.

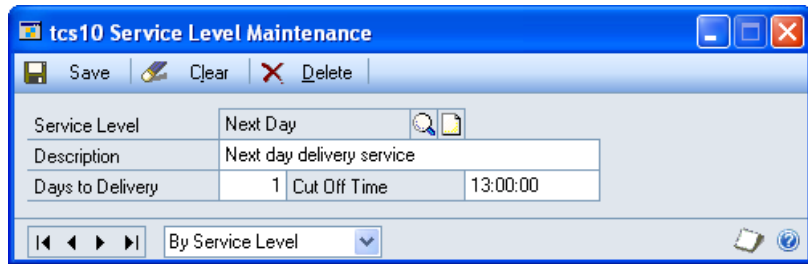
10. Click OK to close the window.

2. Service Level Maintenance Window

Tools >> Setup >> Trinity >> Load Planning >> Service Levels

Use the Service Level Maintenance window to:

- Create and edit service levels



2.1 Creating and Editing Service Levels

To create and edit service levels in the Service Level Maintenance window:

1. Enter a Service Level or click the lookup to select one from the Service Level Lookup window.
2. Enter a Service Level Description.
3. Enter a number for Days to Delivery. This number represents the number of days between deliveries and is used to calculate a ship date.
4. Enter a Cut Off Time. This entry is the latest time that an order can be accepted to still comply with the number of delivery days. If an order is placed after the cut off time, the requested ship date is moved to the next available delivery day for the customer (Extra Address Information Maintenance window).
5. Click the Save button.

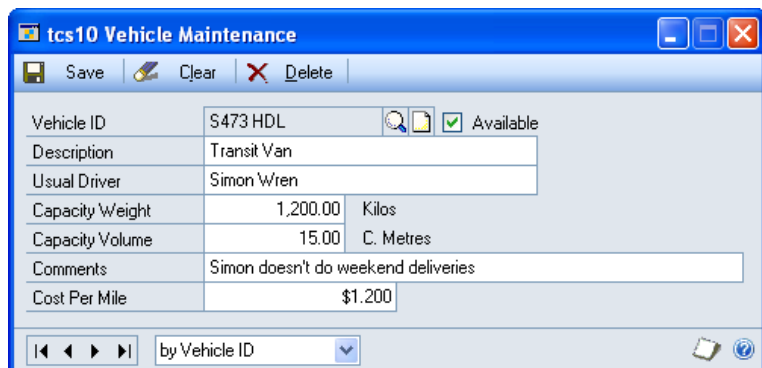
Click the Delete button to delete a service level. Note that a service level is not deleted if it is currently assigned to a load, a customer, or a site.

3. Vehicle Maintenance Window

Tools >> Setup >> Trinity >> Load Planning >> Vehicle Maintenance

Use the Vehicle Maintenance window to:

- Create and edit vehicle details



3.1 Creating and Editing Vehicle Details

To create and edit vehicle details in the Vehicle Maintenance window:

1. Enter a Vehicle ID or click the lookup button to select one.
2. Select the Available checkbox if a vehicle can be used within Load Planning. If a vehicle is not marked as available, it can still be used within load planning. Warnings

are shown whenever loads are assigned to the vehicle, or the vehicle load is printed, informing you that this vehicle is not marked as being available.

3. Enter a Vehicle Description (optional).
4. Enter the name of the Usual Driver.
5. Enter a Capacity Weight. Set up the units for capacity weight in the Load Planning Setup window.
6. Enter a Capacity Volume. Set up the volume units in the Load Planning Setup window.

The driver's name, capacity weight, and capacity volume details can be overwritten for a selected load in the Load Maintenance and Load Header Maintenance windows.

7. Enter some text in the Comments text box (optional). This text is displayed on the load sheet.
8. Enter a Cost Per Mile (optional). This value may be useful for reporting purposes.
9. Click the Save button.

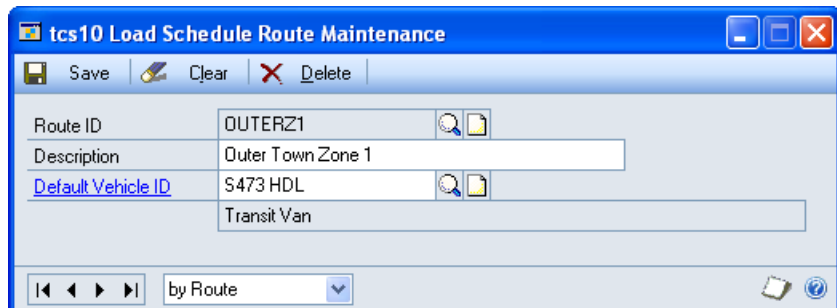
Click the Delete button to delete a vehicle ID. Note that a vehicle ID is not deleted if it is currently assigned to a load or if it is the default vehicle ID on a route.

4. Load Schedule Route Maintenance Window

*Tools >> Setup >> Trinity
>> Load Planning >>
Routes*

Use the Load Schedule Route Maintenance window to:

- Create and edit route descriptions



4.1 Creating and Editing Route Descriptions

To create and edit a route description in the Load Schedule Route Maintenance window:

1. Enter a Route ID or click the lookup to select one from the Route Lookup window.
2. Enter a Route Description.
3. If required, enter a Default Vehicle ID for the route. This vehicle ID is used when auto-creating loads for the route using the Automatic Load Creation window.
4. Click the Save button.

Click the Delete button to delete a route ID. Note that a route is not deleted if it has been assigned to a delivery address.

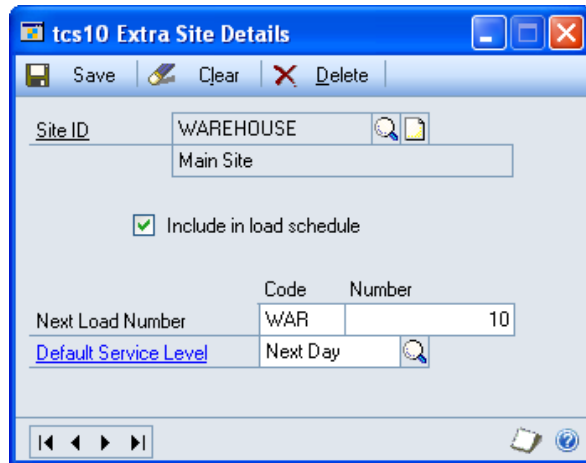
Cards

5. Extra Site Details Window

Cards >> Trinity >> Load Planning >> Extra Site Details

Use the Extra Site Details window to:

- Assign sites to Load Planning



5.1 Assigning Sites to Load Planning

To assign a site to load planning in the Extra Site Details window:

1. Enter a Site ID or click the lookup to select one from the Sites window. If you enter a new Site ID, you are asked if you want to create it.
2. Select the Include in load schedule checkbox to assign this site to Load Planning.
3. A Load Number consists of a code and a number. Enter a Code and a Number in the Next Load Number fields. This Load Number is used when loads are created in the Load Maintenance and Load Header Maintenance windows.
4. Enter a Default Service Level or click the lookup to select one from the Service Level Lookup window. This value is the default service level that is used to calculate the requested ship date (unless a different service level has been assigned to the customer’s address). Create service levels in the Service Level Maintenance window.
5. Click the Save button.

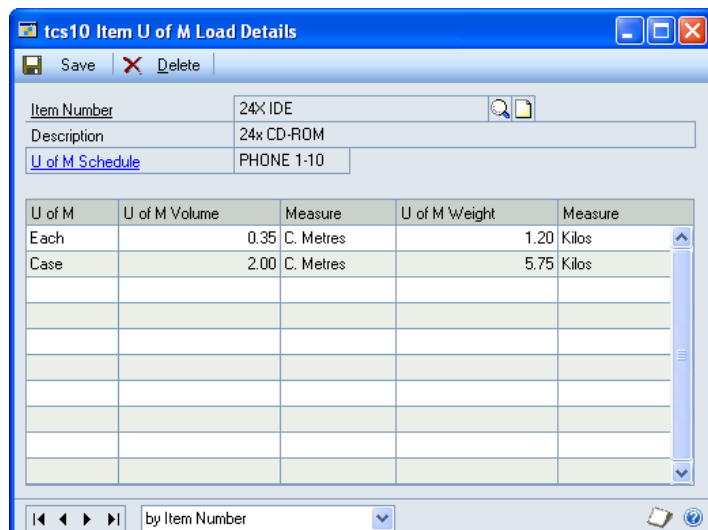
Click the Delete button to delete any load planning details associated with the site. Note that the details are not deleted if this site is in use within Load Planning.

6. Item U of M Load Details Window

Cards >> Trinity >> Load Planning >> Item Load Details

Use the Item U of M Load Details window to:

- Assign weights and volumes to an item



6.1 Assigning Weights and Volumes to Items

To assign weights and volumes to an item in the Item U of M Load Details window:

1. Enter an Item Number or click the lookup to select one from the Items window. The details of the unit of measure schedule are displayed.
2. For each U of M unit, enter a U of M Volume and a U of M Weight. Click the U of M Schedule zoom to open the Unit of Measure Schedule Setup window, which provides details about each unit of measure unit.

Use the Load Planning Setup window to assign weight and volume units.

3. Click the Save button.

Click the Delete button to delete the weights and volumes that have been assigned to an item number.

7. Extra Address Information Maintenance Window

Cards >> Trinity >> Load Planning >> Extra Address Details

Use the Extra Address Information Maintenance window to:

- Switch Load Planning on for a selected customer and customer address

Note that this window can also be displayed as an Additional option from the Customer Address Maintenance window.

7.1 Switching Load Planning On for a Customer

To switch on Load Planning for a customer in the Extra Address Information Maintenance window:

1. The window opens, displaying details of the current customer selection. If required, use the lookups to select an alternative Customer ID or Address ID.
2. Select the Include in Load Schedule checkbox to include the selected address in Load Planning.
3. Select the Delivery Booking Required checkbox if a booking should be made before delivery is scheduled.
4. Enter a Route ID or click the lookup to select one from the Route Lookup window. If you enter a new route, you are asked if you want to create it.
5. Enter a Drop number (optional). Drop numbers are used to sequence the load schedule.
6. Enter a Service Level or click the lookup to select one from the Service Level Lookup window.
7. Under Delivery Days, select checkboxes for the days when deliveries can be made. These days are used to recalculate the ship date.
8. You can use the Days Browse buttons to select days on which deliveries are made by alternate routes. Browse to the required day, then enter the alternate Route ID or select it using the lookup (for example, the standard delivery route may not run on a Sunday, and you are required to deliver by an alternative route on this day). Repeat this as required for other days. You can also enter a Drop number if required.
9. Enter text in the Delivery Instructions text box (optional). This text is displayed on the load sheet.
10. Click the Save button.

Transactions

8. Document Delivery Details Window

Sales Transaction Entry window >> Additional >> Delivery Details

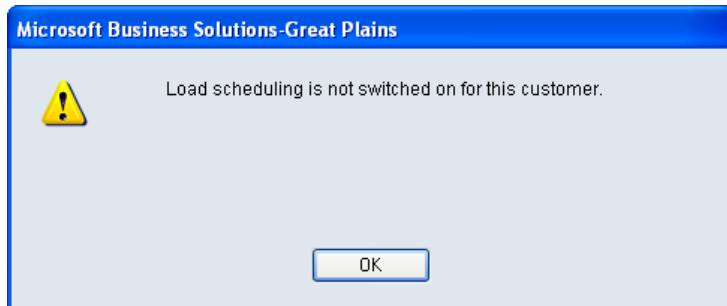
Use the Document Delivery Details window to:

- View and edit Load Planning delivery details for existing documents

Document Information		Booking Information	
Type	Order	Date	4/17/2020
Document Number	ORDST2239	Time	10:45:00 AM
Route	OUTERZ1	Reference	BOOK000000117
Drop	1	Booking Comment:	
Number of Parcels	1		
Requested Ship Date	4/22/2027		
Load Number		Warning: Load scheduling overview windows will require refreshing to reflect any changes made here.	

The Document Delivery Details window can also be opened from the Documents Not Assigned To Loads and Documents Assigned To Loads windows – click the Deliv. Details button.

Note that when creating transactions for customers who have not been assigned to load planning, you are not able to access the Document Delivery Details window from the Sales Transaction Entry window.



Use the Extra Address Information Maintenance window to switch Load Planning on for a customer.

8.1 Viewing and Editing the Load Planning Details for a Document

To view and edit a document's Load Planning details in the Document Delivery Details window:

1. The window opens, displaying details of the document number, route ID, site ID, customer ID, ship-to address, and service level. If required, enter an alternative Route ID or click the lookup to select one from the Route Lookup window.
2. Enter the Drop assigned to the document (optional). Drop numbers are used to sequence the load schedule.
3. Enter the Number of Parcels that make up the delivery (optional).
4. Enter a Requested Ship Date or click the Recalculate button to calculate a ship date that is based on the service level and the customer's assigned delivery days.
5. Enter a Booking Date (optional). This field is for customers who want to book a delivery date and ensures that a booking is made before delivery. When the document is selected in the Documents Not Assigned To Loads or Documents Assigned To Loads windows, a warning icon is displayed informing you that a delivery booking is required and has not yet been made.
6. Enter a Booking Time (optional).
7. Enter a Booking Reference (optional).
8. Enter text in the Booking Comment text box (optional).
9. Click OK to save changes and close the window.

Clicking the Omit button excludes the selected document from load planning.

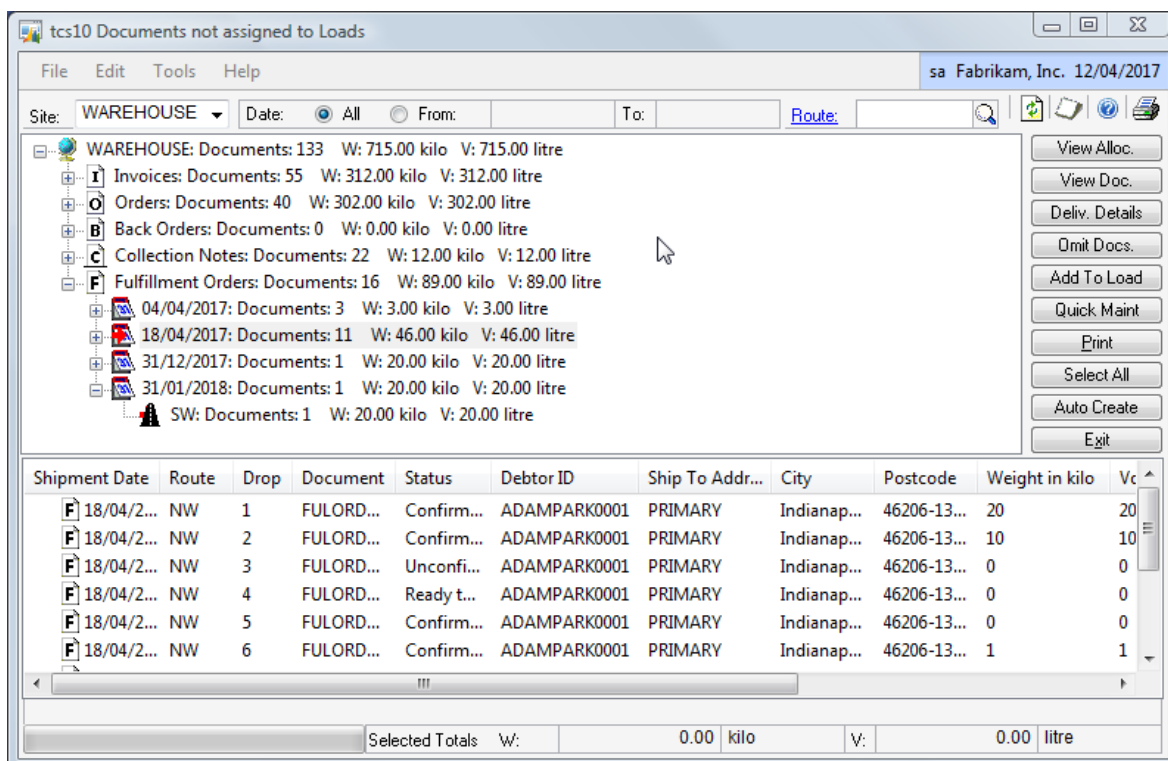
9. Documents Not Assigned To Loads Window

Transactions >> Trinity >> Load Planning >> Docs not on loads

Use the Documents Not Assigned To Loads window to:

- View the unassigned document load schedule
- Add an invoice to a load
- Amend the delivery details
- Omit a document from Load Planning
- View the sales document
- Print a load schedule

Note that if you are using the Returns Management module, this window displays and allows the processing of returns documents as "Collections." It also displays the collection status of returns documents.



9.1 Viewing and Processing the Unassigned Document Load Schedule

The Documents Not Assigned To Loads window only displays records for customer addresses that have been assigned to load planning. Use the Extra Address Information Maintenance window to switch load planning on for selected customer addresses.

To view and process the unassigned document load schedule in the Documents Not Assigned To Loads window:

1. Select a Site or All Sites from the Site drop-down list. Only sites that have Load planning switched on are available to select. When you select a site, no other user can maintain the load plan for that site.
2. Enter From and To dates to specify a date range, or select All to specify all dates.
3. Optionally select a route, or leave blank to show all routes.

4. Click the Refresh All button.

All documents matching your site, date, and route criteria are displayed in the upper half of the window, in a tree view.

The tree view gives a hierarchical view of all documents set up for Load Planning that have not been included in a load. Click the “+” icons to expand branches and the “-“ icons to collapse branches. Each document is divided initially by location (site) and then by document type - *i.e.*, invoice, order, or backorder. Each document type is sorted first by date and then by the route. The total number of sales documents, total weight, and total volume are shown at each level.



Each level has a different icon associated with it.



When a level is selected, the icon changes to show a red arrow.

Associated documents are displayed in the list view on the lower half of the screen when a date or route is selected. Use this list view to manage your documents.

The list view is divided into thirteen columns: Shipment Date, Route, Drop, Document Number, Document Status, Customer ID, Ship To Address, City, Postcode, Weight, Volume, Number of parcels and Customer name. Click a column header to sort the list view in ascending or descending order. Double click a document in the list view to display it in the Sales Transaction Inquiry Zoom window.



The list view icons indicate the document type, *i.e.*, order, invoice, fulfillment order.



If any of the documents require delivery booking, and a booking has not been made, a warning icon is displayed. Click the icon to display the warning message at the bottom of the window.



Another icon is used to indicate if the address details have been amended.

The combined weight and volume of any documents selected in the list view are displayed at the bottom of the Documents Not Assigned To Loads window. This value gives you an indication of the total weight and volume that is added to a load.

5. Use the buttons on the right-hand side of the window to perform functions:

To view allocated documents:

- a) Click the View Alloc. button. The Documents Assigned To Loads window opens.

To view more detailed information about a document:

- a) Select a document in the list view.
- b) Click the View Doc. button or double click the document. The Sales Transaction Inquiry Zoom window opens.

To see or edit the Load planning details for a document:

- a) Select a document in the list view.
- b) Click the Deliv. Details button. The Document Delivery Details window opens.

To omit a document from Load planning:

- a) Select a document in the list view.
- b) Click the Omit Docs. button.
- c) Click the Omit button in the information dialog.

Once a document has been omitted from the load system, it does not appear in any of the

windows. If you attempt to view the document's delivery details, you are informed that the document has not been included in the load planning system. Use the Reinstated Omitted Documents From Load Schedule window to restore the document to load planning.

To add an invoice to a load:

- a) Select an invoice in the list view.
- b) Click the Add To Load button. The Load Maintenance window opens.

Use standard Windows key combinations to select multiple documents.

To edit the routes and drops on the documents currently displayed in the list view:

- a) Click the Quick Maint button
- b) Choose Quick Maintenance by Customer/Address or by Document
- c) The selected Quick Route/Drop Maintenance window opens

To automatically create a load:

- a) Select a document to create a load for the specified date range automatically, or a route to automatically create a load for a specified route. Note that you are not required to make a selection.
- b) Click the Auto Create button. The Automatic Load Creation window opens.

To print a load schedule:

- a) Click the Print button. The Load Schedule Prints window opens.

6. Click the Exit button to close the Documents Not Assigned To Loads window.

Any changes made to the load system such as the creation, movement, or amendment of documents are not reflected in the open Documents Not Allocated To Loads window until the Refresh Data button is clicked.

Use the Sales Multiple Order To Invoices window (see Microsoft Dynamics™ GP Advanced Distribution) for the bulk transfer of orders to invoices for specified routes.

10. Load Maintenance Window

Documents Not Assigned To Loads window >> Click the Add To Load button

Use the Load Maintenance window to:

- Create a load
- Assign a document to a load

10.1 Creating and Editing Loads

To create or edit a load in the Load Maintenance window:

The window opens, displaying details of the current Site ID and Load Number. A Load Number is made up of a code, which cannot be edited, and a number.

1. Select a Load number:

To specify an existing Load number:

- Enter a Load number or click the lookup to select one from the Delivery Load lookup window. The details of the selected load are displayed in the window.

To specify a new Load number:

- Click the Take next load number button. The next available number is displayed.
2. Enter a Load Date. The load date usually is the ship date. However, if multiple deliveries with different delivery dates are being sent out in the same load, it may be more useful to enter a delivery or loading date. This date is used to sort documents in the tree view of the Documents Assigned To Loads window.
 3. Enter or edit the Vehicle ID or click the lookup to select one from the Vehicle Lookup window. If you enter a new Vehicle ID, you are asked if you want to create it.

The Driver, Capacity Weight, and Capacity Volume details associated with the selected Vehicle ID are displayed.

4. If required, edit the name of the Driver. Note that any changes only affect this load.
5. If required, edit the Capacity Weight. Note that any changes you make only affect this load.
6. If required, edit the Capacity Volume. Note that any changes you make only affect this load.

The Capacity Weight and Capacity Volume fields give you the flexibility to force a vehicle to take more than its capacity weight and volume if required. If a vehicle has been forced over its capacity weight/volume, warnings appear whenever the load is created, or the load sheet is printed.

7. If required, enter the description of this load. If entered, the description appears in the Document Assigned to Loads window.
8. Click the Save button to save the load details.

Click the Delete button to delete a load record. Note that the record is not deleted if documents have already been assigned to it.

Note that you can close the load at any point by clicking the Load Closed checkbox. Documents cannot be added to a load that has been closed.

10.2 Assigning Documents to Loads

To assign a document to a load in the Load Maintenance window:

1. Enter or select the load details as described in Creating and editing loads.
2. Click the Save button (if you are creating or editing loads).

The load details are displayed in the window. The Printed checkbox indicates if the load schedule has been printed, and the Adjusted checkbox indicates if the load has changed since it was printed. The Available checkbox indicates if the selected vehicle is available.

Current Weight is the total weight already assigned to the load, and Current Volume is the total volume already assigned to the load. Available Weight and Available Volume indicate how much more weight and volume can be added to the current load. Document(s) Weight and Document(s) Volume show the combined weight of all documents to be added to this load.

3. All documents to be added to the load are listed in the Documents to Add to Load List box. Click the Add To Load button to add these documents to the load.

The Load Maintenance window closes, and you are returned to the Documents Not Assigned To Loads window.

11. Automatic Load Creation Window

Documents Not Assigned To Loads window >> Click the Auto Create button

Use the Automatic Load Creation window to:

- Automatically create loads for documents not assigned to a load

Site	Delivery Date	Route	Vehicle ID	Create New Load?	Load Exists
WAREHOUSE	14/04/2007	nw	M561 YYY	⚠	☑

11.1 Automatically Creating Loads

To automatically create loads in the Automatic Load Creation window:

1. Select a site from the drop-down menu for which loads are automatically created.
If a site or document/route was selected in the Documents Not Assigned To Loads window (rather than All Sites), then that site is selected by default.
2. All requested ship dates are selected by default. Accept this selection or click the From button and enter a from and to date range.

If a document/documents were selected in the Documents Not Assigned To Loads window, then the document date is selected by default as the date range.

3. All routes are selected by default. Accept this selection or click the From button and enter a from and to route range.

If a route was selected in the Documents Not Assigned To Loads window, then the route is selected by default as the route range.

4. Select the View Allocated Loads option to display the Documents Assigned To Loads window once the loads have been created.
5. Select the Print Audit Report option to produce an audit report of newly created loads. This report is available for printing each time you automatically create loads.
6. Select the Workflow statuses of documents to be included on this load.
7. If using the Returns Management module, choose whether Return documents should be included on the load, and select the Collection Statuses of Return documents to be included.
8. Loads are displayed by Delivery Date by default. Select Route from the drop-down menu to display loads by route.
9. Click the Preview button to view suggested loads for the selected range in the scrolling window.

The scrolling window displays each site/route combination in the selected range, where unallocated documents can be used to build a load.

If a default vehicle ID has been assigned to a route in the Load Schedule Route Maintenance window, then this is displayed as the Vehicle ID. Use the lookup to select alternate vehicle IDs. A vehicle ID must be selected for a line before loads can be automatically created.

Click the Show button to view the number of drops required for the load, the volume and weight for each load, and the percentage capacity of the vehicle ID the load uses.



If the volume or weight of the load is more than 100% capacity of the selected vehicle, then you are unable to create a load for this line automatically and should create it following standard load planning procedures.

If there are already one or more loads created for the delivery date/route combination, the Load Exists checkbox is marked, and you are not able to create loads for this line automatically. Documents should be added to loads using standard load planning procedures.

10. Click the Create New Load? checkbox for each line that you want to create a new load for, or use the Mark All/Unmark All buttons to select/deselect all lines for automatic load creation.
11. Click the Create Loads button to automatically create loads for the selected delivery date/route combinations.

If selected, the Automatic Load Creation - Audit report is printed, and the Documents Assigned To Loads window is displayed.

Note that drops for automatically created loads are based on those set up for customers in the Extra Address Information Maintenance window.

12. Click Cancel to close the window.

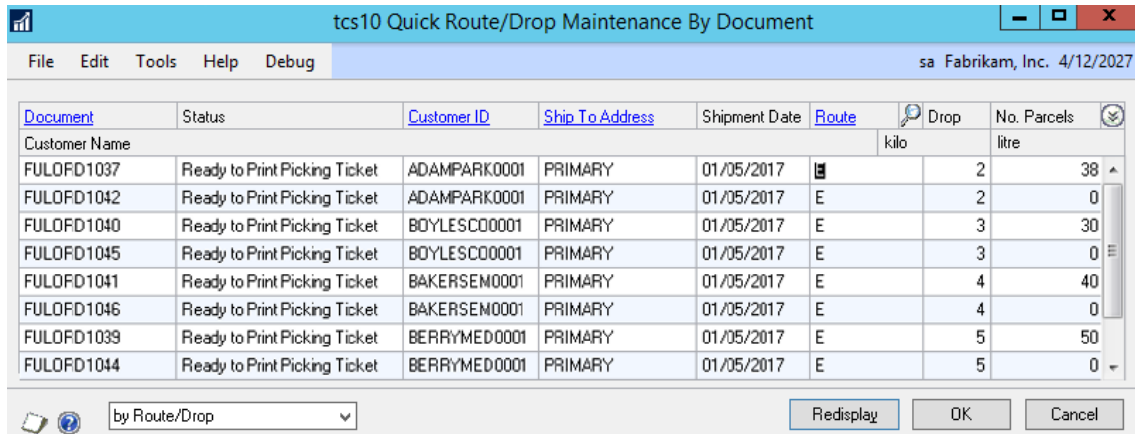
12. Quick Route/Drop Maintenance by Document Window

Documents Not Assigned To Loads window >> Click the Quick Maint button >> By Document

Documents Assigned To Loads window >> Click the Quick Maint button >> By Document

Use the Quick Route/Drop Maintenance by Document window to:

- Change the Route, Drop and Number of Parcels on a range of documents



12.1 Changing the Route, Drop and Number of Parcels on a Range of Documents

To change the route, drop, and number of parcels on a range of documents in the Quick Route/Drop Maintenance by Document window:

When the Quick Maint button > By Document option is selected from the Documents Not Assigned to Loads or the Documents Assigned to Loads window, the Quick Route/Drop Maintenance by Document window opens with all the documents from the list view displayed in a scrolling window.

1. Edit the Routes and Drops of the displayed documents.
2. Edit the Number of Parcels of the displayed documents.
3. Press Redisplay to review the list of documents in Route/Drop sequence
4. Press OK to save your changes and return to the Documents Not Assigned to Loads window or the Documents Assigned to Loads window, or Press Cancel to discard your changes.

Note that changes made to routes in this window do not result in load re-assignment, even if you have enabled the Automatic Load Creation option in the Load Planning Setup window.

13. Quick Route/Drop Maintenance by Customer and Address Window

Documents Not Assigned To Loads window >> Click the Quick Maint button >> By Customer/Address

Documents Assigned To Loads window >> Click the Quick Maint button >> By Customer/Address

Use the Quick Route/Drop Maintenance by Customer and Address window to:

- Change the Route, Drop, and Number of Parcels by Customer/Ship To Address for a range of documents. A summary view by Customer/Ship To Address is presented. Changes made to the route and drop are rolled down to the associated documents. Number of parcels is stored against the first document only.

Customer ID	Customer Name	Ship To Address	Route	Drop	No. Parcels
Address Details					
				kilo	litre
ADAMPARK0001	Adam Park Resort	PRIMARY	E	2	38
BOYLESC00001	Boyle's Country Inn's	PRIMARY	E	3	30
BAKERSEM0001	Baker's Emporium Inc.	PRIMARY	E	4	40
BERRYMED0001	Berry Medical Center	PRIMARY	E	5	50
ADAMPARK0001	Adam Park Resort	BILLING	E	6	15

13.1 Changing the Route, Drop and Number of Parcels by Customer/ShipTo Address for a Range of Documents

To change the route, drop and number of parcels on a range of documents in the Quick Route/Drop Maintenance by Customer and Address window:

Select the Quick Maint button > by Customer/Address option from the Documents Not Assigned to Loads or the Documents Assigned to Loads window. The Quick Route/Drop Maintenance by Customer and Address window opens and displays a summary (by customer/ship-to address) of all the documents from the list view in a scrolling window.

1. Edit the Routes and Drops displayed in the scrolling window. The changes made are rolled down to the related documents, i.e., the documents currently displayed in the main window list view with a matching customer and ship-to address.
2. Edit the Number of Parcels displayed in the scrolling window. The number entered should be the total number of parcels to be delivered to the selected customer/ship-to address. It is stored against the first document with a matching customer and ship-to address.
3. Press Redisplay to review the list of customer/addresses

- Press OK to save your changes and return to the Documents not Assigned to Loads window or the Documents Assigned to Loads window, or Press Cancel to discard your changes.

Note that changes made to routes in this window do not result in load re-assignment, even if you have enabled the Automatic Load Creation option in the Load Planning Setup window.

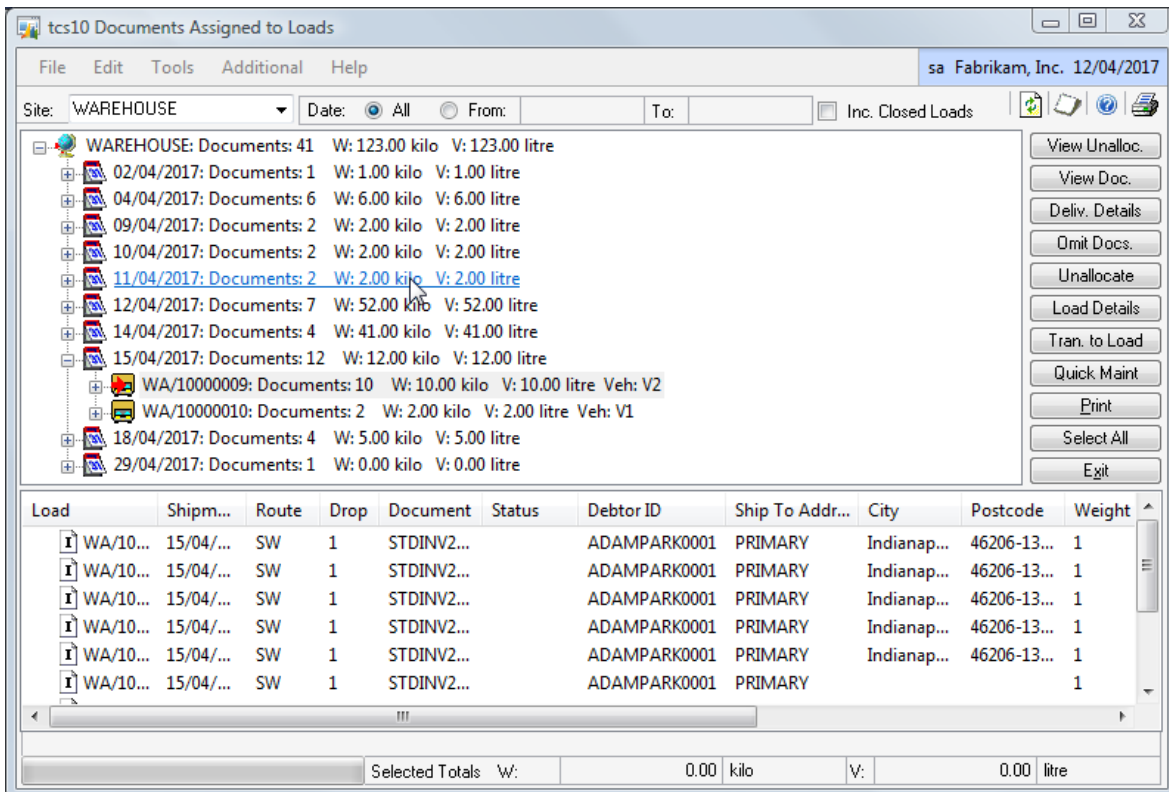
14. Documents Assigned To Loads Window

Transactions >> Trinity >> Load Planning >> Docs on loads

Use the Documents Assigned To Loads window to:

- View the assigned document load schedule
- De-allocate a document from a load
- Transfer documents between loads
- Amend the delivery details
- Omit a document from Load planning
- View the sales document
- Print a load schedule

Note that if you are using the Returns Management module, this window displays and allows the processing of returns documents as "Collections." It also displays the collection status of returns documents.



14.1 Viewing and Processing the Assigned Document Load Schedule



To view and process the assigned document load schedule in the Documents Assigned To Loads window:

1. Select a Site or All Sites from the Site drop-down list. Only sites that have Load planning switched on are available to select. When you select a site, no other user can maintain the load plan for that site.
2. Enter From and To dates to specify a date range, or select All to specify all dates.
3. Click Inc. Closed Loads to include closed loads in the details viewed.
4. Click the Refresh Data button.

All documents matching your site and date criteria are displayed in the upper half of the window, in a tree view.



The tree view gives a hierarchical view of all allocated documents that have not been omitted from Load Planning. Each record is organized initially by site, then by load date, by load, and finally by route. The total number of documents, total weight, and total volume are shown at each level.

Levels can be expanded and collapsed by clicking the “+” and “– “ icons.

-  Each level is represented by a different icon.
- When a level is selected, the icon changes to show a red arrow pointing to it.
-  Associated documents are displayed in the lower half of the window in the list view when a load or route is selected.

The list view is divided into fourteen columns: Load, Shipment Date, Route, Drop, Document No, Document Status, Customer ID, Ship To Address, City, Postcode, Weight, Volume, Number of parcels and Customer name.

Click a column header to sort the list view in ascending or descending order. Double click a document in the list view to display it in the Sales Transaction Inquiry Zoom window.

-  If a document requires delivery booking and a booking has not been made, a warning icon is displayed. Click on the icon to display the warning message.
-  Another icon is used to indicate if the address details have been amended.

The combined weight and volume of any documents selected in the list view are displayed at the bottom of the Documents Assigned To Loads window.

5. Use the buttons on the left-hand side of the window to perform functions:

To view unallocated documents:

- a) Click the View Unalloc. button.

The Documents Not Assigned To Loads window opens.

To view more detailed information about a document:

- a) Select a document in the list view.
- b) Click the View Doc. button or double click the document.

The Sales Transaction Inquiry Zoom window opens.

To see or edit the Load planning details for a document:

- a) Select a document in the list view.
- b) Click the Deliv. Details button.

The Document Delivery Details window opens.

To omit a document from Load planning:

- a) Select a document in the list view.
- b) Click the Omit Docs. button.
- c) Click the Omit button in the information dialog.

To de-allocate a document from a load:

- a) Select a document in the list view.
- b) Click the Unallocate button.
- c) Click the Unallocate button in the information dialog.

To maintain the load header details:

- a) Select a document in the list view.
- b) Click the Load Details button.

The Load Header Maintenance window opens.

To transfer a document to another load:

- a) Select the document in the list view
- b) Click the Tran. to Load button.

The Load Header Maintenance window opens.

To edit the routes and drops on the documents currently displayed in the list view:

- a) Click the Quick Maint button
- b) Choose Quick Maintenance by Customer/Address or by Document
- c) The selected Quick Route/Drop Maintenance window opens

To print a load schedule:

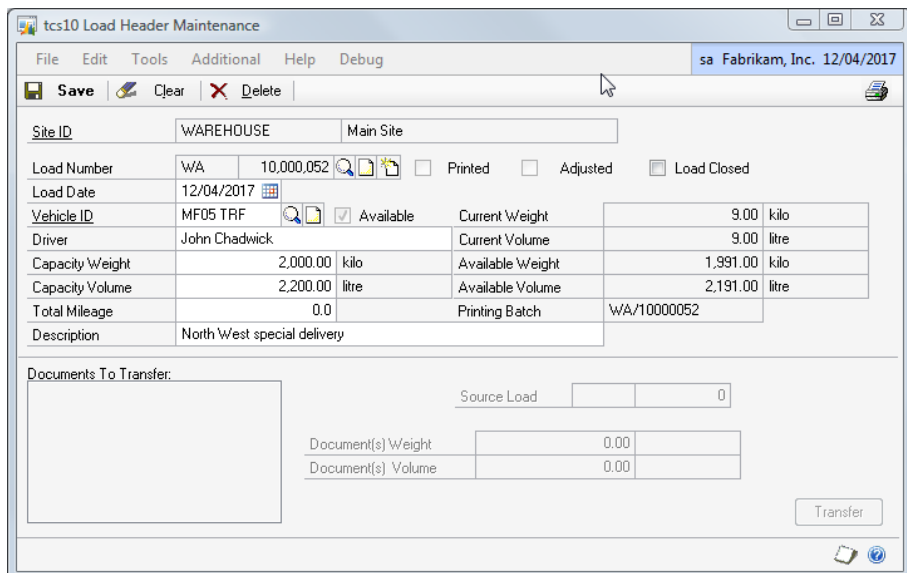
- a) Click the Print button. The Load Schedule Prints window will.
6. Click the Exit button to close the Documents Assigned To Loads window.

15. Load Header Maintenance Window

Documents Assigned To Loads window
 >> *Click the Load Details button or the Tran. to Load button*

Use the Load Header Maintenance window to:

- Create and edit loads
- Transfer documents between loads



To create and edit loads, access the Load Header Maintenance window by clicking the Load Details button. To transfer documents between loads, access the Load Header Maintenance window by clicking the Tran. To Load button.

15.1 Creating and Editing Loads

To create and edit loads in the Load Header Maintenance window:

The window opens, displaying details of the current Site ID and Load Number. A Load Number is made up of a code, which cannot be edited, and a number.

1. Select a Load number:

To specify an existing Load number:

- Enter a Load number or click the lookup to select one from the Delivery Load Lookup window. The details of the selected load display in the window.

To specify a new Load number:

- Click the Take next load number button. The next available number is displayed.
2. Enter a Load Date. The load date is typically the ship date. However, if multiple deliveries with different delivery dates are being sent out in the same load, it may be more useful to enter a delivery or loading date. This date is used to sort documents in the tree view of the Documents Assigned To Loads window.

Note that if you automatically created loads using the Automatic Load Creation window, then the date is the requested ship date on the originating invoices.

3. Enter or edit the Vehicle ID or click the lookup to select one from the Vehicle Lookup window. If you enter a new Vehicle ID, you are asked if you want to create it.

The Driver, Capacity Weight, and Capacity Volume details associated with the selected Vehicle ID are displayed.

4. If required, edit the name of the Driver. Note that any changes only affect this load.
5. If required, edit the Capacity Weight. Note that any changes you make only affect this load.
6. If required, edit the Capacity Volume. Note that any changes you make only affect this load.
7. If required, enter the description of this load. If entered, the description appears in the Document Assigned to Loads window.
8. Click the Save button to save the load details.

Use the Load Maintenance window to assign a document to a load.

Click the Delete button to delete a load record. Note that a load is not deleted if documents have been assigned to it.

Note that you can close the load at any point by clicking the Load Closed checkbox. Documents cannot be added to a load that has been closed.

15.2 Transferring Documents Between Loads

The transfer functionality in the Load Header Maintenance window is only enabled if you open it by clicking the Tran. to Load button in the Documents Assigned To Loads window.

To transfer documents between loads in the Load Header Maintenance window:

1. Enter or select the load details as described in the section on Creating and Editing Loads (15.1). This data is the destination load.
2. Click the Save button (if you create or edit a load).

All documents to be transferred are listed in the Documents To Transfer list box. The Load Number of the load you are transferring documents from is displayed in the Source Load field.

3. Click the Transfer button.

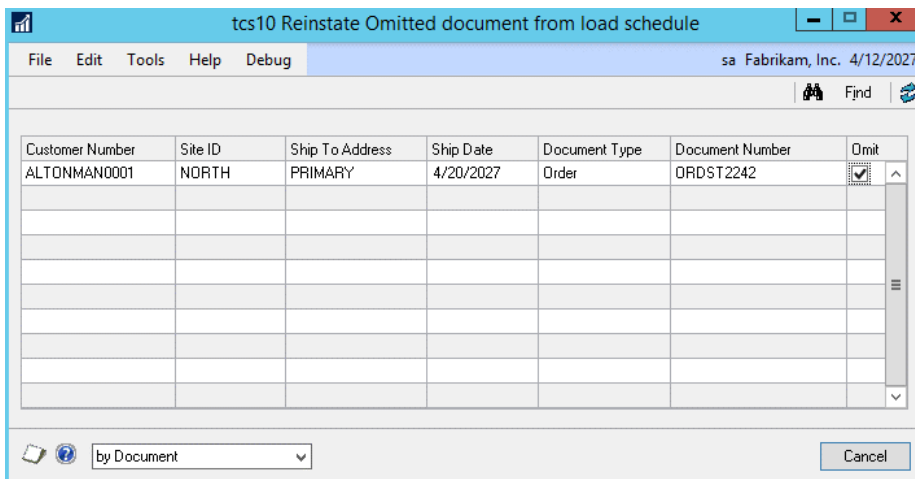
The Load Header Maintenance window closes, and you are returned to the Documents Assigned To Loads window. Click Refresh to update changes.

16. Reinstate Omitted Document from Load Schedule Window

Transactions >> Trinity >> Load Planning >> Reinstate Omitted Documents

Use the Reinstate Omitted Document From Load Schedule window to:

- Restore an excluded document to the Load planning schedule



16.1 Reinstating Omitted Documents

Documents can be omitted from load planning in the Document Delivery Details and Documents Not Assigned/Assigned To Loads windows).

To reinstate an omitted document in the Reinstate Omitted Document From Load Schedule window:

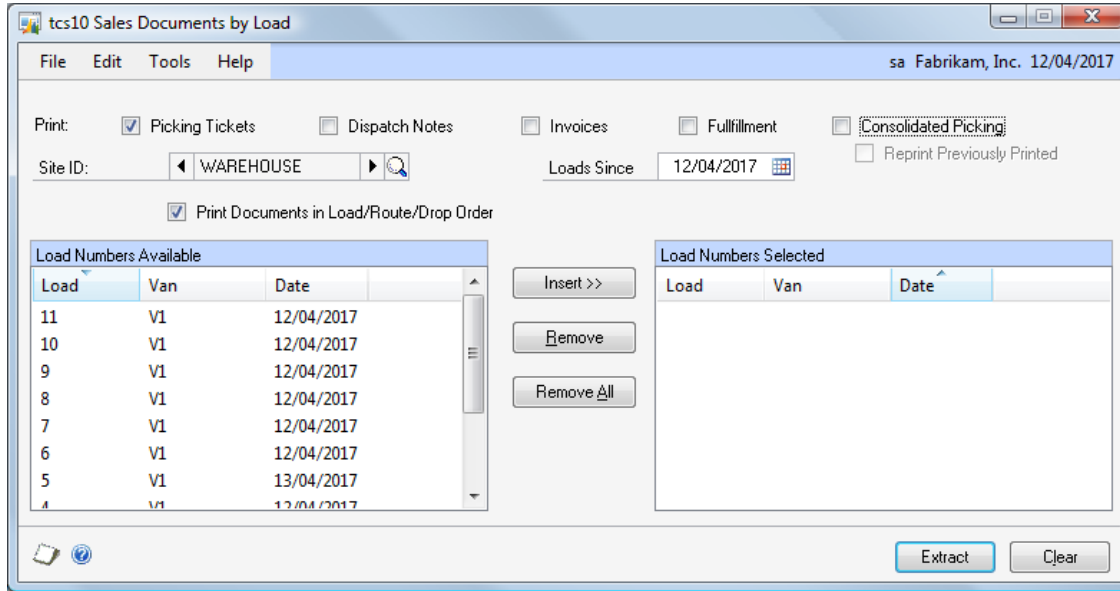
1. The window opens, displaying all documents that have been omitted from Load planning. The customer ID, site ID, ship-to address, ship date, document type, and document number for each document is shown.
2. To search for a specific document, click the Find button to open the Find window. Search for a document by document number, requested ship date, or site ID.
3. Clear the Omit checkbox for each document you want to restore to Load planning.
4. Click the Redisplay button to update the display.
5. Click OK to close the window.

17. Sales Documents by Load Window

Transactions >> Trinity >> Load Planning >> Pick and Delivery by Load

Use the Sales Documents by Load window to:

- Print sales documents by load
- Print consolidated picking tickets by load



17.1 Printing Sales Documents by Load

To print sales documents in the Sales Documents by Load window:

1. Click the checkboxes to select to print picking tickets, delivery notes, invoices, fulfillment orders, or consolidated picking lists. If required, you can select multiple document types simultaneously.
2. If you choose the Consolidated Picking option, you may optionally choose the Reprint Previously Printed option to reprint Consolidated Picking Tickets for loads that have already been printed.
3. Click the Sites lookup to select a site ID or use the browse buttons to search through existing sites.
All available load numbers for the selected site are displayed in the Load Number Available scrolling window.
4. Enter a Loads Since date to restrict the loads displayed in the Load Numbers Available window.
5. By default, documents are printed out in the sales order document number sequence. Select the Print Documents in Route/Drop Order to print documents out in load sequence. Documents are printed by drop order for each route and by route order for each load. When printing documents for multiple loads, they are sequenced by load number. Note that this option does not apply to the Consolidated Picking Ticket.
6. A list of loads available for printing is displayed in the Load Numbers Available scrolling window, showing the load number, vehicle, requested ship date, and the route of the first document on the load.
7. Click on a load number in the Load Numbers Available scrolling window and click Insert. The load number is moved to the Load Numbers Selected scrolling window. You

may repeat this as many times as required to select multiple load numbers. The load numbers in the Load Numbers Selected scrolling window are those that have been selected for document printing.

Note that you can select a document in the Load Number Selected scrolling window and click Remove to deselect it from document printing, or click Remove All to deselect all load numbers.

8. Click the Extract button to Process. For Picking Tickets, Delivery Note, Invoices, and Fulfillment orders, clicking this button results in the extraction of documents to the appropriate batch (see Creating and maintaining loads). The batch is passed into the Sales Document Printing window.

For Consolidated Picking, the picking ticket is produced without extraction to a batch. The consolidated picking ticket shows the items to be picked for all the documents on the load, in bin sequence.

18. Load Schedule Prints Window

Transactions >> Trinity >> Load Planning >> Print Loads

Use the Load Schedule Prints window to:

- Print load schedules

18.1 Printing Load Schedules

To print load schedules in the Load Schedule Prints window:

1. Click the Sites lookup to select a Site ID from the Sites window or use the browse buttons to search through available sites.
2. Select the Print allocated or the Print unallocated option button. This action specifies whether actual loads (allocated) or documents that have not yet been assigned to loads (unallocated) are printed.
3. Select or clear the Include Item Details checkbox. If this checkbox is selected, details are printed for each item.
4. Select or clear the Print Values checkbox. If this checkbox is selected, all item line details are printed. This option is only available if the Include Item Details checkbox has been selected.
5. For allocated loads, you can also choose to print adjusted documents, non-printed documents, or printed documents only by selecting the appropriate checkbox. Adjusted documents are documents that have been altered since they were initially printed.

6. Enter From and To dates to specify a date range, or select All to specify all dates. This entry specifies the date range of documents to be included.

If you are printing allocated loads, the date is based on the load date. If you are printing unallocated documents, the requested ship date of the document is used.

7. For allocated loads, enter From and To load numbers or use the lookups to specify a Load Number range, or select All to specify all load numbers. This entry specifies which load numbers are included, which is useful if you want to print a driver's load sheet, for example.
8. For unallocated documents, enter From and To routes or use the lookups to specify a Route range, or select All to specify all routes. This entry specifies which routes are included.
9. Click the Print button and enter your print options in the Report Destination window.

Page Number: 1 User ID: sa	Fabrikam, Inc.	03/11/2004 13:52:40						
<p style="text-align: center; margin: 0;"><i>Vehicle Details:</i></p> S473 HDL Simon doesn't do weekend deliveries Simon Wren 1,200.00 Kilos 15.00 C. Metres	<p>Schedule for Load:</p> <p style="font-size: 1.2em;">WAR /10</p> <p style="font-size: 1.2em;">WAREHOUSE</p>	<p style="text-align: center; margin: 0;"><i>Load Totals:</i></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Weight</td> <td>24.00 Kilos</td> </tr> <tr> <td>Volume</td> <td>7.00 C. Metres</td> </tr> <tr> <td>Documents</td> <td>1</td> </tr> </table>	Weight	24.00 Kilos	Volume	7.00 C. Metres	Documents	1
Weight	24.00 Kilos							
Volume	7.00 C. Metres							
Documents	1							
<table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Route: OUTERZ1</td> <td style="width: 70%;">Outer Town Zone 1</td> </tr> <tr> <td>Drop: 1</td> <td></td> </tr> <tr> <td>Document</td> <td style="text-align: right;">Address</td> </tr> </table>			Route: OUTERZ1	Outer Town Zone 1	Drop: 1		Document	Address
Route: OUTERZ1	Outer Town Zone 1							
Drop: 1								
Document	Address							
STDINV2274 Aaron Fitz Electrical One Microsoft Way Redmond WA 98052-6399 Tel: 42555501010000	<p><i>Del. Details:</i></p> Sunday deliveries not before 11:00. Contact: Bob Fitz	<table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Parcels</td> <td style="width: 40%;">Weight</td> </tr> <tr> <td>1</td> <td>24.00 Kilos</td> </tr> <tr> <td></td> <td>7.00 C. Metres</td> </tr> </table>	Parcels	Weight	1	24.00 Kilos		7.00 C. Metres
Parcels	Weight							
1	24.00 Kilos							
	7.00 C. Metres							
24XIDE	24x CD-ROM	20 Each						
		Signature 						

Note that if you are using the Returns Management module, collections may appear on driver's load sheets and are clearly marked as such.

19. Microsoft Dynamics™ GP Advanced Picking with Vehicle Load Planning

Microsoft Dynamics™ GP Advanced Picking provides additional functionality for printing picking lists, such as printing bulk picking lists. The Trinity Vehicle Load Planning module is fully integrated with Advanced Picking to enable you to print picking lists for specified loads.

The Bulk Picking Print window has been enhanced to include the option to bulk print by load. Use the Bulk Picking Print window to select loads for which you want to print picking lists.

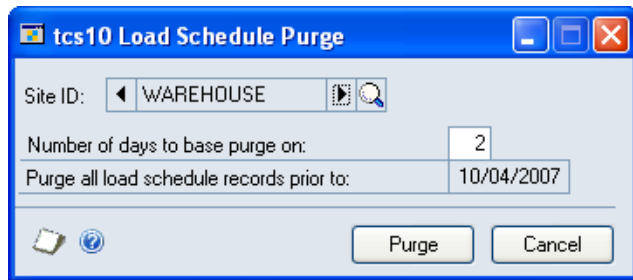
Routines

20. Load Schedule Purge Window

Tools >> Routines >> Trinity >> Load Planning >> Purge Loads

Use the Load Schedule Purge window to:

- Remove load records that are older than a specified date
- Remove load records that have not yet been allocated to a load, and have requested ship dates that are older than a specified date
- Remove load records that have been omitted from the load schedule, and have requested ship dates that are older than a specified date



20.1 Removing Load Schedule Records

To remove load records in the Load Schedule Purge window:



1. Click the lookup to select a Site ID from the Sites window or use the browse buttons to search through the available sites.
2. Click the Purge button.

The Number of Days to Base Purge On value is retrieved from the Days to retain loads field in the Load Planning Setup window. If load planning details have not been set up in the Load Planning Setup window, the default value of 30 is used. The Purge All Load Schedule Records Prior To date is a calculated value based on the current date minus the value entered in the Number of Days to Base Purge On field.

While the purge is in progress, a Purge in Progress window is displayed, showing a progress indicator. All load records older than the specified date are deleted.

Appendix A

Vehicle Load Planning - Access to Windows

Window Name	 Menu Access	 Other Access
Automatic Load Creation window		Documents Not Assigned To Loads window >> Click the Auto Create button
Document Delivery Details		Sales Transaction Entry window >> Additional >> Delivery Details (once a valid document ID has been selected) Documents Assigned/Not Assigned To Loads windows >> Click the Deliv. Details button
Documents Assigned to Loads	Transactions >> Trinity >> Load Planning >> Docs on loads	Documents Not Assigned To Loads window >> View Alloc. button
Documents Not Assigned to Loads	Transactions >> Trinity >> Load Planning >> Docs not on loads	
Extra Address Information Maintenance	Cards >> Trinity >> Load Planning >> Extra Address Details	
Extra Site Details	Cards >> Trinity >> Load Planning >> Extra Site Details	
Item U of M Load Details	Cards >> Trinity >> Load Planning >> Item Load Details	Item Maintenance window >> Additional >> Load Scheduling (once an item has been selected)
Load Header Maintenance		Documents Assigned To Loads window >> Click the Load Details button or the Tran. to Load button
Load Maintenance		Documents Not Assigned To Loads window >> Click the Add To Load button
Load Planning Setup	Tools >> Setup >> Trinity >> Load Planning >> Setup	
Load Schedule Prints	Transactions >> Trinity >> Load Planning >> Print Loads	Documents Assigned/Not Assigned to Loads windows >> Click the Print button

Load Schedule Purge	Tools >> Routines >> Trinity >> Load Planning >> Purge Loads	
Load Schedule Route Maintenance	Tools >> Setup >> Trinity >> Load Planning >> Routes	
Quick Route Drop Maintenance by Document		Documents Assigned/Not Assigned to Loads windows >> Click the Quick Maint button >> By Document
Quick Route Drop Maintenance by Customer and Address		Documents Assigned/Not Assigned to Loads windows >> Click the Quick Maint button >> By Customer/Address
Reinstate Omitted Document from Load Schedule	Transactions >> Trinity >> Load Planning >> Reinstate Omitted Documents	
Sales Documents by Load	Transactions >> Trinity >> Load Planning >> Pick and Delivery by Load	
Service Level Maintenance	Tools >> Setup >> Trinity >> Load Planning >> Service Levels	
Vehicle Maintenance	Tools >> Setup >> Trinity >> Load Planning >> Vehicle Maintenance	

Appendix B

Modified Microsoft Dynamics™ GP Windows in the Vehicle Load Planning module

Window Name	Series	Module	Modification
Bulk Picking Print	Sales	Vehicle Load Planning	Additional option to bulk pick print by load
Sales Automatic Order Allocation	Sales	Vehicle Load Planning	Includes the option to select by route range
Sales Document Print Options	Sales	Vehicle Load Planning	Includes additional functionality required for load planning
Sales Multiple Orders To Invoice Transfer	Sales	Vehicle Load Planning	Includes the option to select by route range
Sales Transaction Entry	Sales	Vehicle Load Planning	Underlying functionality enables load planning information to be incorporated into sales transactions

Appendix C

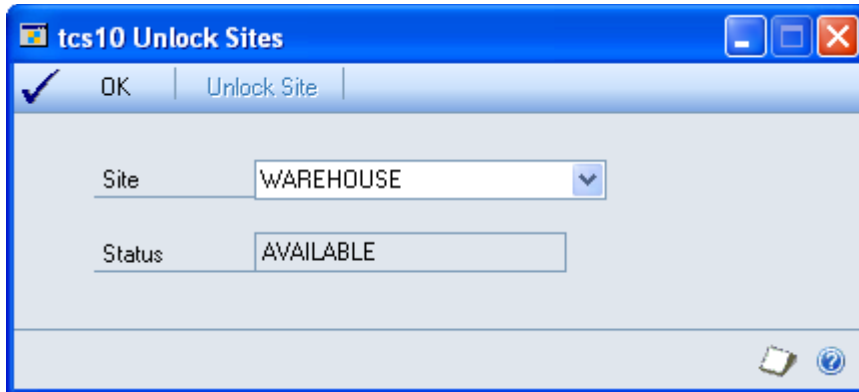
Vehicle Load Planning - Reports

Report Name	Module	Functionality
Automatic Load Creation - Audit report	Load Planning	Prints details of loads created using the Automatic Load Creation window
Load Schedule report	Load Planning	Prints out load schedules (or documents not yet assigned to load schedules) based on the range selected in the Load Scheduling Prints window

Appendix D

Vehicle Load Planning Support Tools

The Unlock Sites window allows you to unlock any sites that may have become locked for load planning.



1. Open the Unlock Sites window (*Tools >> Routines >> Trinity >> Load Planning >> Unlock Sites*).
2. Select a site from the drop-down menu.
3. The status of the site is displayed. If the site is locked, then click the Unlock Site button to unlock the site.
4. Click OK to close the window.

Appendix E

About Trinity

Help >> About Microsoft Dynamics GP >> Additional >> About Trinity Suite

Use the About Trinity Suite window to check your registration information and installation details. The window tells you which Trinity modules you are registered to use and which have been installed on your system.

