myridas™ User Guide

Version 9.0 for Microsoft Dynamics™ GP 9.0

Vehicle Load Planning

Trinity Computer Services Limited

January 2006

Contents

CONTENTS 2

USING THIS GUIDE 4

ABOUT MYRIDAS 5

VEHICLE LOAD PLANNING 6

Service levels..*6*
Vehicle and driver details *6*
Route descriptions..*7*
Creating and maintaining loads..*7*
Integration with Microsoft Dynamics™ GP *7*

SETUP 8

1. LOAD PLANNING SETUP WINDOW 8
1.1 Setting up Load Planning Details *8*
2. SERVICE LEVEL MAINTENANCE WINDOW 9
2.1 Creating and Editing Service Levels..*9*
3. VEHICLE MAINTENANCE WINDOW 10
3.1 Creating and Editing Vehicle Details *10*
4. LOAD SCHEDULE ROUTE MAINTENANCE WINDOW..11
4.1 Creating and Editing Route Descriptions *11*

CARDS..**12**

5. EXTRA SITE DETAILS WINDOW..12
5.1 Assigning Sites to Load Planning..*12*
6. ITEM U OF M LOAD DETAILS WINDOW 13
6.1 Assigning Weights and Volumes to Items..*13*
7. EXTRA ADDRESS INFORMATION MAINTENANCE WINDOW 14
7.1 Switching Load Planning on for a Debtor *14*

TRANSACTIONS..**16**

8. DOCUMENT DELIVERY DETAILS WINDOW..16
8.1 Viewing and Editing the Load Planning Details for a Document..*17*
9. DOCUMENTS NOT ASSIGNED TO LOADS WINDOW 18
9.1 Viewing and Processing the Unassigned Document Load Schedule *18*
10. LOAD MAINTENANCE WINDOW 21
10.1 Creating and Editing Loads..*21*
10.2 Assigning Documents to Loads *22*
11. AUTOMATIC LOAD CREATION WINDOW..23
11.1 Automatically Creating Loads *23*
12. DOCUMENTS ASSIGNED TO LOADS WINDOW 26
12.1 Viewing and Processing the Assigned Document Load Schedule..*26*
13. LOAD HEADER MAINTENANCE WINDOW..29
13.1 Creating and Editing Loads..*29*
13.2 Transferring Documents between Loads..*30*
14. REINSTATE OMITTED DOCUMENT FROM LOAD SCHEDULE WINDOW 31
14.1 Reinstating Omitted Documents..*31*
15. SALES DOCUMENTS BY LOAD WINDOW..32
15.1 Printing Sales Documents by Load..*32*
16. LOAD SCHEDULE PRINTS WINDOW 34
16.1 Printing Load Schedules *34*

17. MICROSOFT DYNAMICS™ GP ADVANCED PICKING WITH VEHICLE LOAD PLANNING 36

ROUTINES....37

18. LOAD SCHEDULE PURGE WINDOW....37

18.1 Removing load schedule records....37

APPENDIX A....38

ACCESS TO MYRIDAS WINDOWS....38

Vehicle Load Planning....38

APPENDIX B....40

MODIFIED MICROSOFT DYNAMICS™ GP WINDOWS....40

APPENDIX C....41

MYRIDAS REPORTS....41

APPENDIX D....42

VEHICLE LOAD PLANNING SUPPORT TOOLS....42

INDEX....43

Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Vehicle Load Planning module:

- Vehicle Load Planning

The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See Appendix A for a list of Myridas windows and their location in the software.

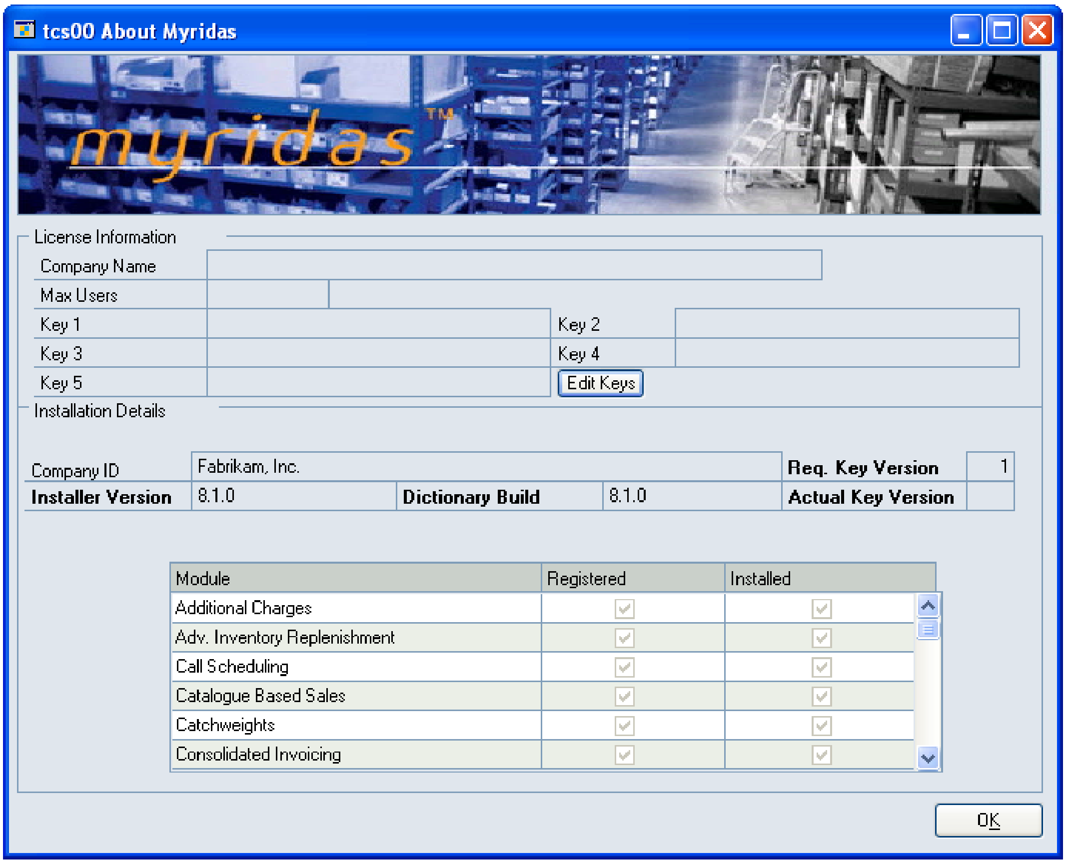
A full range of tutorials is also available on our website, http://www.trinitypartner.com.

About Myridas

Help >> About Myridas

Use the About Myridas window to check your license information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About Myridas window



Vehicle Load Planning

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

The main features of Load Planning are:

- The allocation of delivery routes and drop numbers to debtor ship to addresses
- The application of service level and normal delivery day information to the calculation of order delivery dates
- An overview of order despatch 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 despatch
- A facility to transfer bulk orders to invoices for a specified route
- A facility to create loads from despatches and allocate loads to vehicles
- A facility to compare the weight and volume of a load against vehicle capacity
- A facility to autocreate loads for despatches not assigned to a load
- The production of sales documents 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 service that you can offer debtors, 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 debtor 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 categorise debtor 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 debtor 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 etc. 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, autocreate loads using the Automatic Load Creation window.

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

When you create a new load number a corresponding batch will be 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 then they will be 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

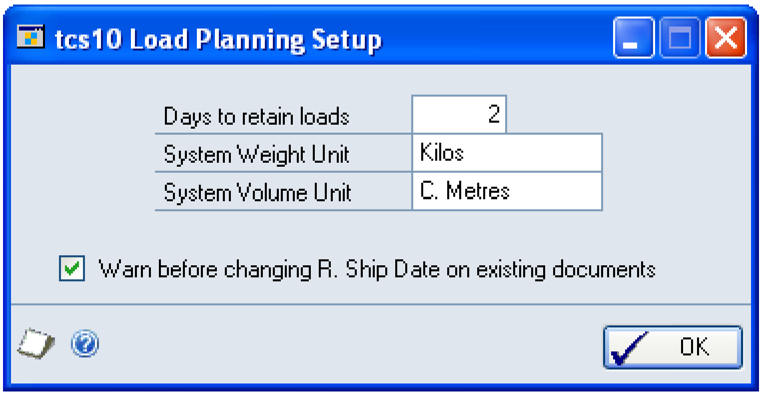
1. Load Planning Setup window

Tools >> Setup >> Myridas >> Load Planning >> Setup

Use the Load Planning Setup window to:

- Set up Load Planning details

Load Planning Setup window



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 will be used throughout load planning.
3. Enter a unit of volume in the System Volume Unit field. This volume unit will be 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 R. Ship Date on existing documents option to receive a warning before requested ship dates on amended documents are recalculated.
5. Click OK to close the window.

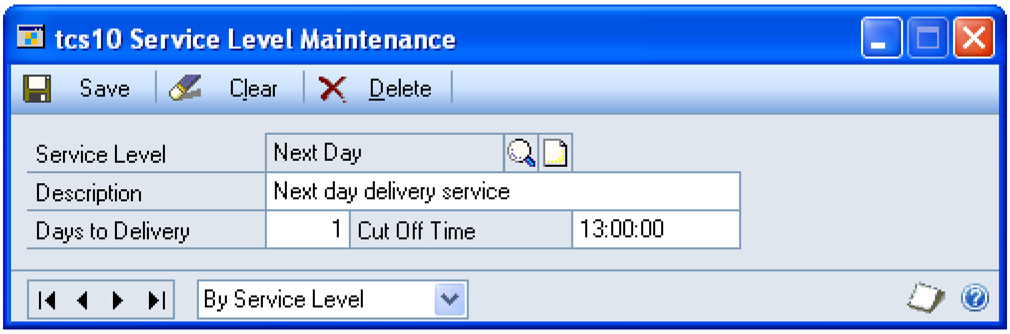
2. Service Level Maintenance Window

Tools >> Setup >> Myridas >> Load Planning >> Service Levels

Use the Service Level Maintenance window to:

- Create and edit service levels

The Service Level Maintenance window



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 is the number of days between despatch and delivery, and will be used to calculate a ship date.
4. Enter a Cut Off Time. This 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 will be incremented to the next available delivery day for the debtor (Extra Address Information Maintenance window).
5. Click the Save button.

Deleting service levels

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

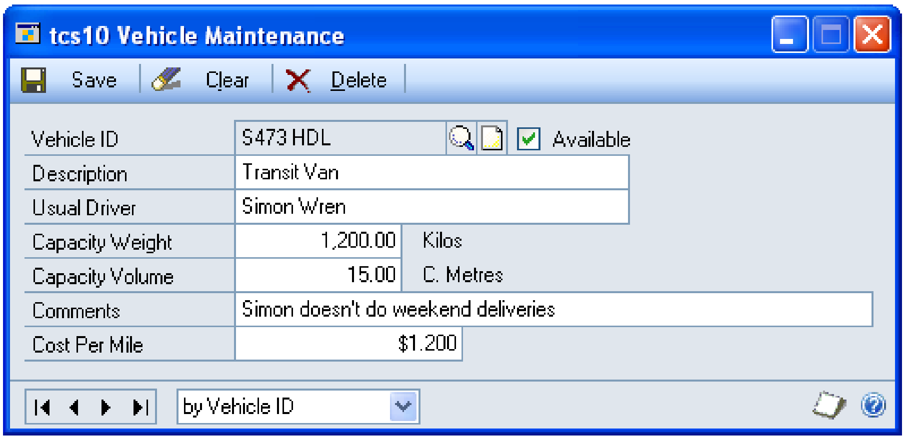
3. Vehicle Maintenance Window

Tools >> Setup >> Myridas >> Load Planning >> Vehicle Maintenance

Use the Vehicle Maintenance window to:

- Create and edit vehicle details

The Vehicle Maintenance window



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 check box 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 will be shown whenever loads are assigned to the vehicle or the load vehicle 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 will be displayed on the load sheet.
8. Enter a Cost Per Mile (optional). This may be useful for reporting purposes.
9. Click the Save button.

Deleting vehicle IDs

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

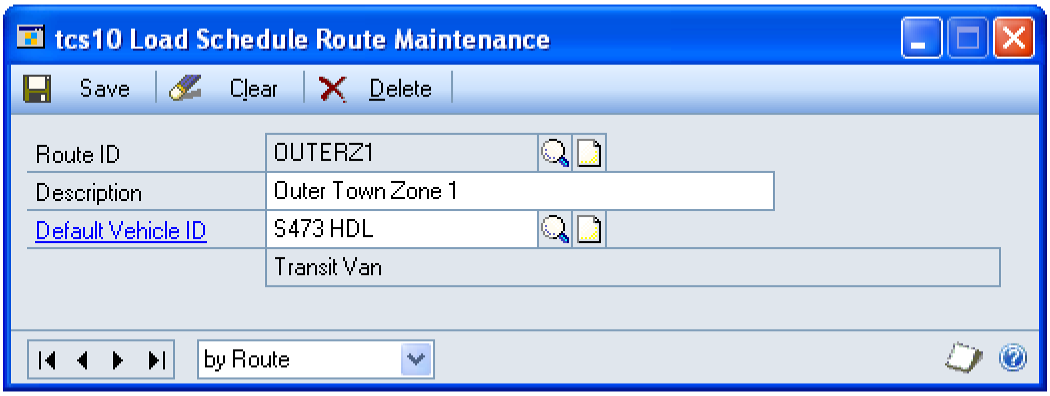
4. Load Schedule Route Maintenance Window

Tools >> Setup >> Myridas >> Load Planning >> Routes

Use the Load Schedule Route Maintenance window to:

- Create and edit route descriptions

The Load Schedule Route Maintenance window



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 will be used when autocreating loads for the route using the Automatic Load Creation window.
4. Click the Save button.

Deleting route IDs

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

Cards

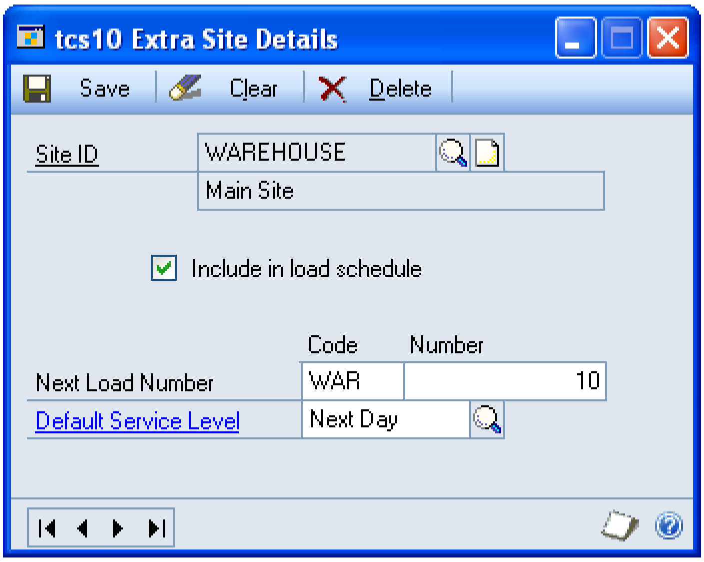
5. Extra Site Details window

Cards >> Myridas >> Load Planning >> Extra Site Details

Use the Extra Site Details window to:

- Assign sites to Load Planning

The Extra Site Details window



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 will be asked if you want to create it.
2. Select the Include in load schedule check box 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 will be 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 is the default service level that will be used to calculate the requested ship date (unless a different service level has been assigned to the debtor’s address). Create service levels in the Service Level Maintenance window.
5. Click the Save button.

Deleting site details

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

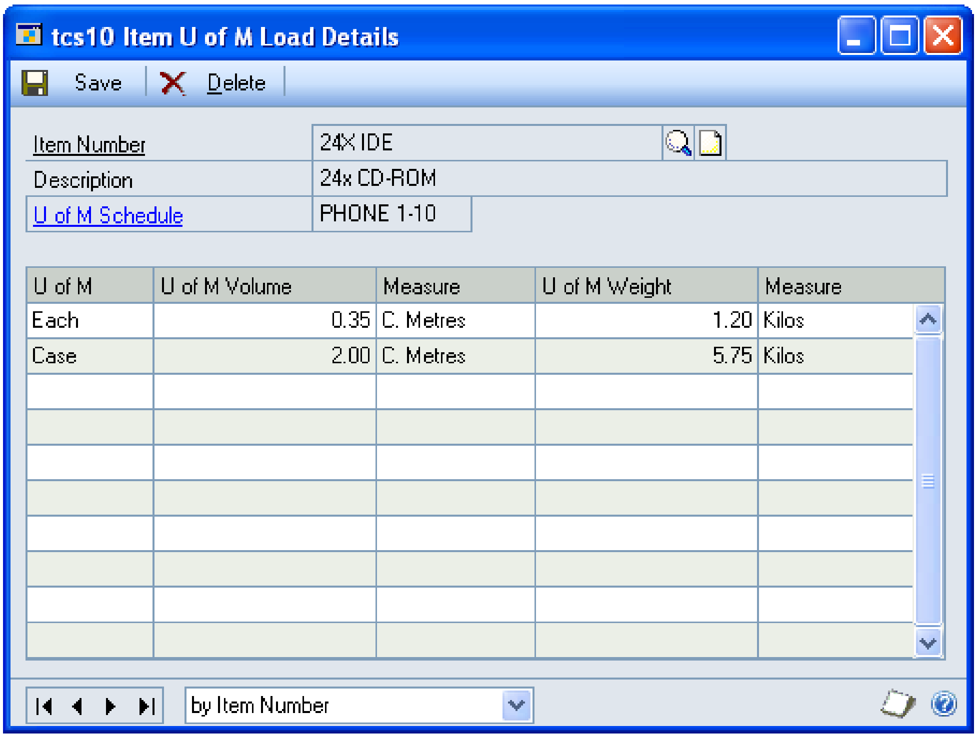
6. Item U of M Load Details Window

Cards >> Myridas >> Load Planning >> Item Load Details

Use the Item U of M Load Details window to:

- Assign weights and volumes to an item

The Item U of M Load Details window



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 unit of measure schedule details will be 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 will provide details about each unit of measure unit.

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

3. Click the Save button.

Deleting weights and volumes

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

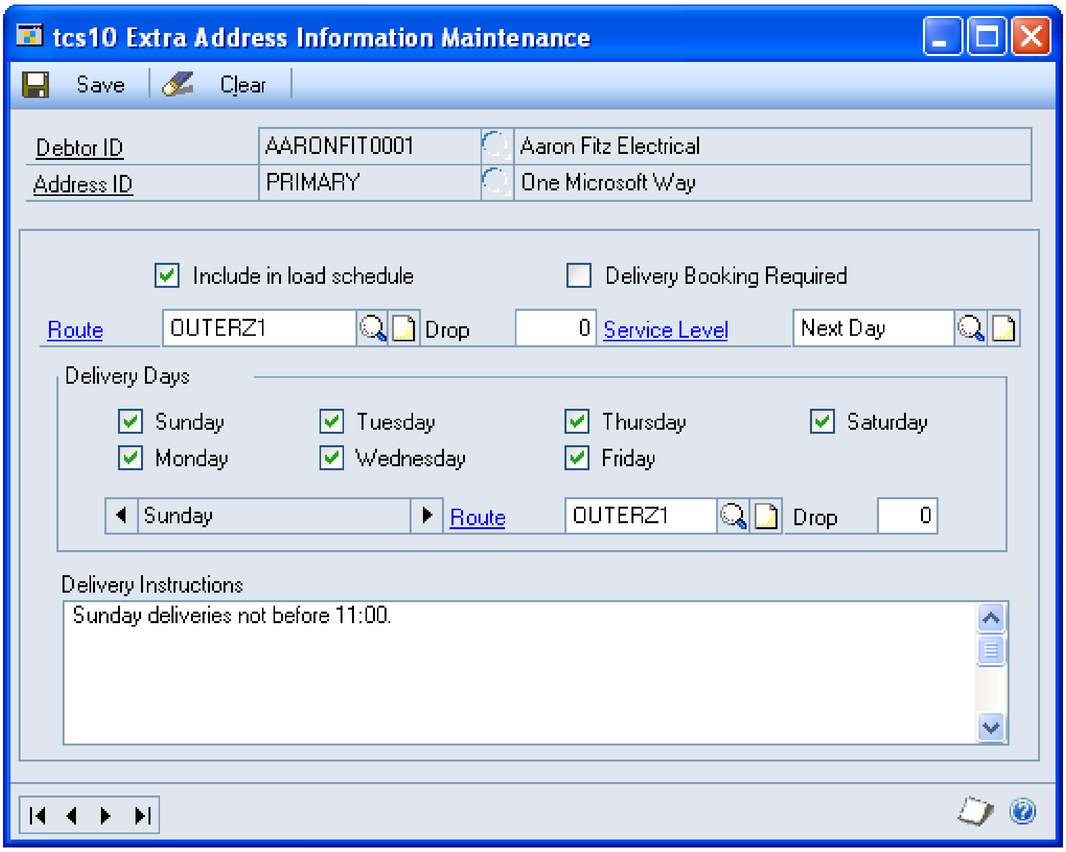
7. Extra Address Information Maintenance window

Cards >> Myridas >> Load Planning >> Extra Address Details

Use the Extra Address Information Maintenance window to:

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

The Extra Address Information Maintenance window



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

7.1 Switching Load Planning on for a Debtor

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

1. The window will open displaying details of the current debtor selection. If required, use the lookups to select an alternative Debtor ID or Address ID.
2. Select the Include in load schedule check box to include the selected address in Load Planning.
3. Select the Delivery Booking Required check box if a booking should be made prior to a delivery.
4. Enter a Route ID or click the lookup to select one from the Route Lookup window. If you enter a new route, you will be 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 check boxes for the days when deliveries can be made. These days will be used to recalculate the ship date.
8. You can use the Days Browse buttons to select days on which deliveries will be 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 will be displayed on the load sheet.
10. Click the Save button.

Transactions

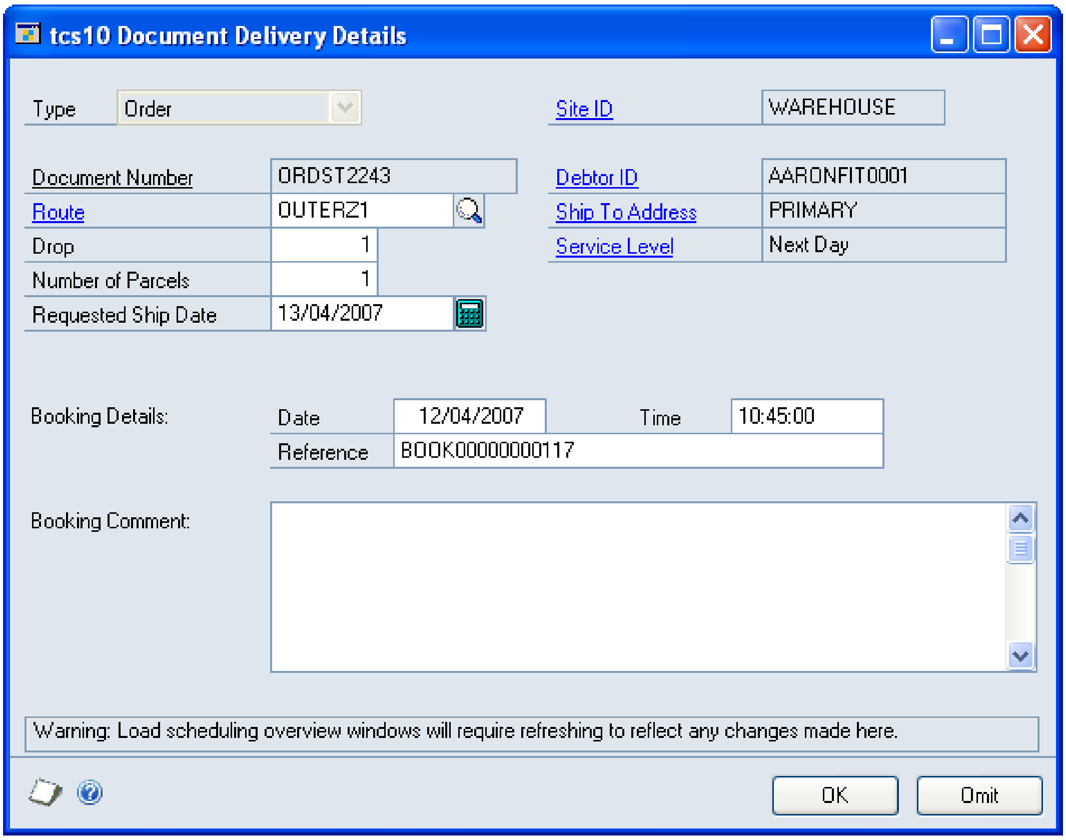
8. Document Delivery Details Window

Sales Transaction Entry window >> Extras >> Additional >> Delivery Details

Use the Document Delivery Details window to:

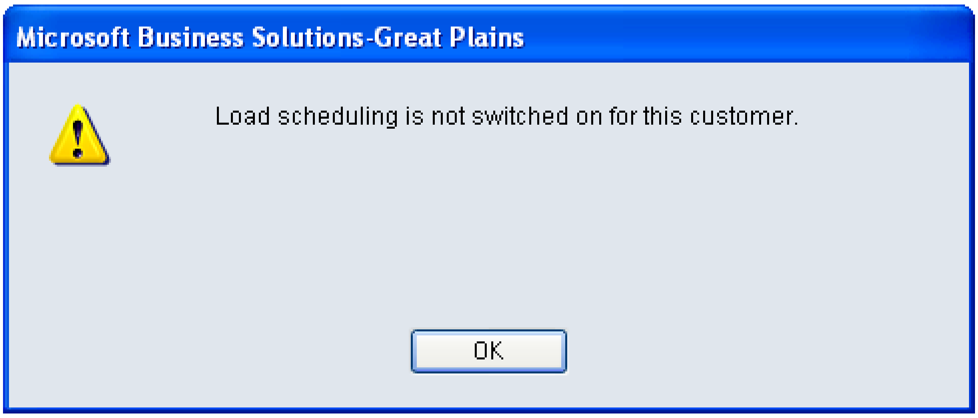
- View and edit Load Planning delivery details for existing documents

The Document Delivery Details window



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 debtors who have not been assigned to load planning, you will not be 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 debtor.

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 will open displaying details of the document number, route ID, site ID, debtor 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 will make up the delivery (optional).
4. Enter a Requested Ship Date or click the Recalculate button to calculate a ship date which is based on the service level and the debtor's assigned delivery days.
5. Enter a Booking Date (optional). This field is for debtors who want to book a delivery date, and ensures that a booking is made prior to delivery. When the document is selected in the Documents Not Assigned To Loads or Documents Assigned To Loads windows, a warning icon will be 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 will exclude the selected document from load planning.

9. Documents Not Assigned To Loads Window

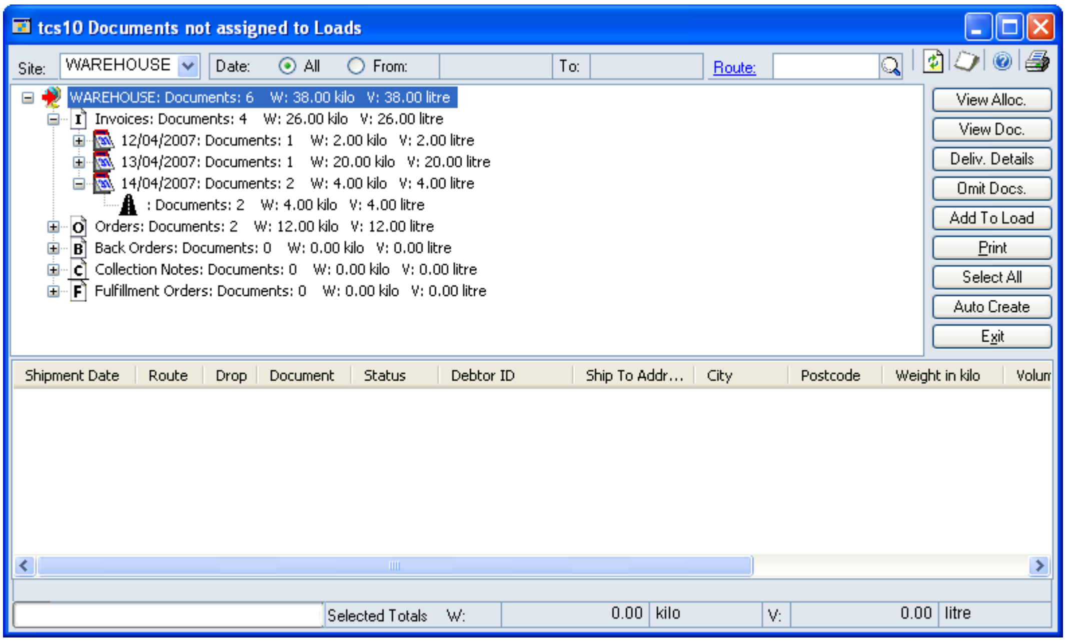
Transactions >> Myridas >> Load Planning >> Docs not on loads

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 then this window will display and allow processing of returns documents as "Collections". It will also display the collection status of returns documents.

The Documents Not Assigned To Loads window



9.1 Viewing and Processing the Unassigned Document Load Schedule

The Documents Not Assigned To Loads window will only display records for debtor addresses which have been assigned to load planning. Use the Extra Address Information Maintenance window to switch load planning on for selected debtor 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 will be available to select. When you select a site, no other user will be able to maintain the load plan for that site.

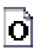
2. Enter From and To dates to specify a Date range, or select All to specify all dates.
3. Optionally select a route, or leave blank to show all routes.
4. Click the Refresh All button.

All documents matching your site, date and route criteria will be 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 back order. Each document type is sorted first by date and then by route. The total number of sales documents, total weight and total volume is 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. When a date or a route is selected, all associated documents are displayed in the lower half of the screen, in the list view. Use the list view to manage your documents.

The list view is divided into thirteen columns: Shipment Date, Route, Drop, Document Number, Document Status, Debtor ID, Ship To Address, City, Postcode, Weight, Volume, Number of parcels and Debtor 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 Enquiry Zoom window.



The list view icons indicate the document type, e.g. order, invoice, fulfilment order. In addition, if any of the documents require delivery booking, and a booking has not been made, a warning icon will be 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 will be displayed at the bottom of the Documents Not Assigned To Loads window. This gives you an indication of the total weight and volume that will be 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 will open.

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 Enquiry Zoom window will open.

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 will open.

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 will not appear in any of the windows. If you attempt to view the document's delivery details, you will be informed that the document has not been included in the load planning system. Use the Reinstate 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 will open.

Use standard Windows key combinations to select multiple documents.

To automatically create a load:

a) Select a document to automatically create a load for the specified date range 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 will open.

To print a load schedule:

a) Click the Print button. The Load Schedule Prints window will open.

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 will not be reflected in the open Documents Not Allocated To Loads window until the Refresh Data button is clicked.

Transferring multiple orders to invoices

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.

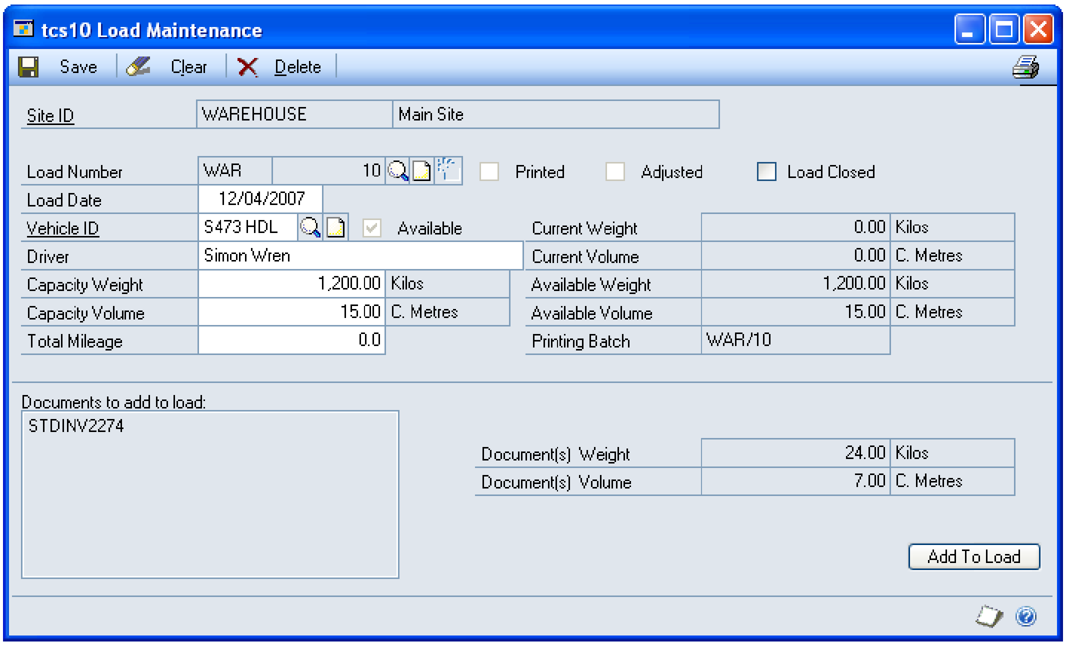
10. Load Maintenance Window

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

The Load Maintenance window



10.1 Creating and Editing Loads

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

The window will open 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 will be displayed in the window.

To specify a new Load number:

- Click the Take next load number button. The next available number will be displayed.

2. Enter a Load Date. The load date will normally be the ship date. However, if multiple despatches with different delivery dates are being sent out in the same load, it may be more useful to enter a despatch or loading date. This

date will be 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 will be asked if you want to create it.

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

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

The capacity weight and 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 will be given whenever the load is created or the load sheet is printed.

7. Click the Save button to save the load details.

Deleting load records

Click the Delete button to delete a load record. Note that the record will not be 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 will be displayed in the window. The Printed check box indicates if the load schedule has been printed, and the Adjusted check box 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 will close and you will be returned to the Documents Not Assigned To Loads window.

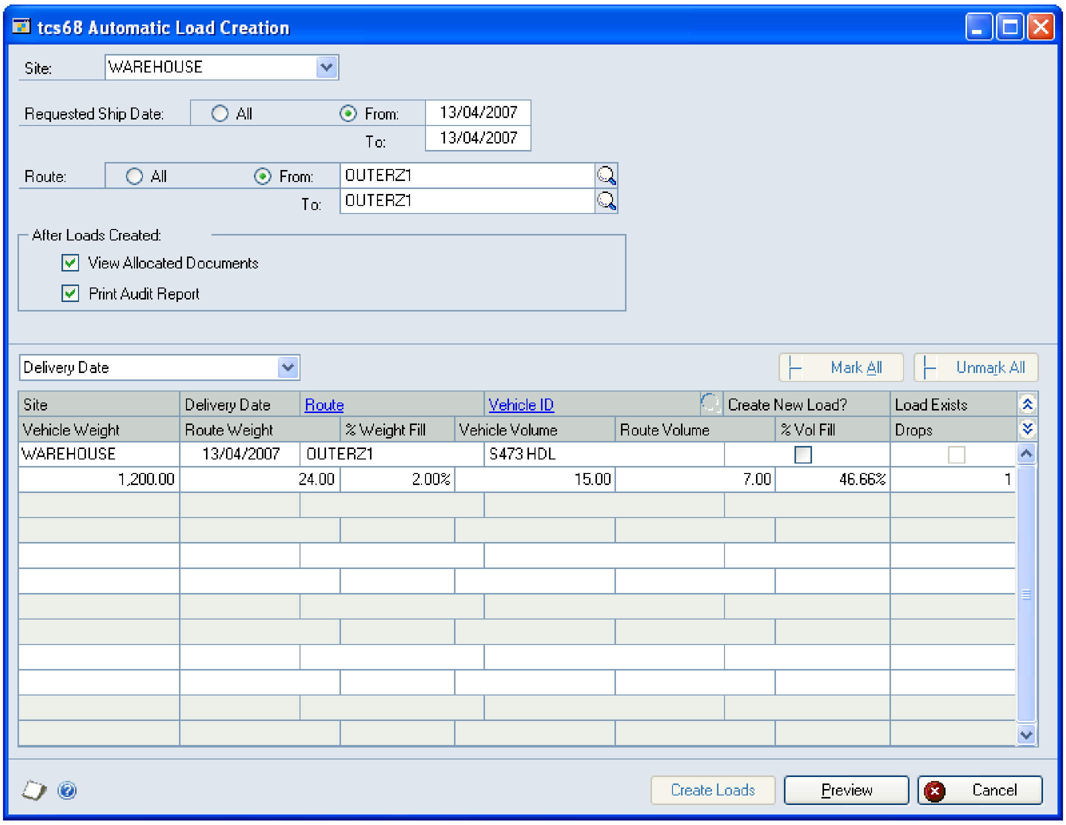
11. Automatic Load Creation window

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

The Automatic Load Creation window



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 will be 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 will be selected by default.

2. All requested ship dates will be 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 will be selected by default as the date range.

3. All routes will be 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 will be 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 autocreate loads.

6. Loads will be displayed by Delivery Date by default. Select Route from the drop-down menu to display loads by route.

7. Click the Preview button to view suggested loads for the selected range in the scrolling window.

   The scrolling window will display 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 will be 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 the load will use of the vehicle ID. If the volume and/or weight of the load is greater than 100% capacity of the selected vehicle then you will be unable to autocreate a load for this line and should create it following standard load planning procedures.

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

8. 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.

9. Click the Create Loads button to automatically create loads for the selected delivery date/route combinations.

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

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

10. Click Cancel to close the window.

12. Documents Assigned To Loads Window

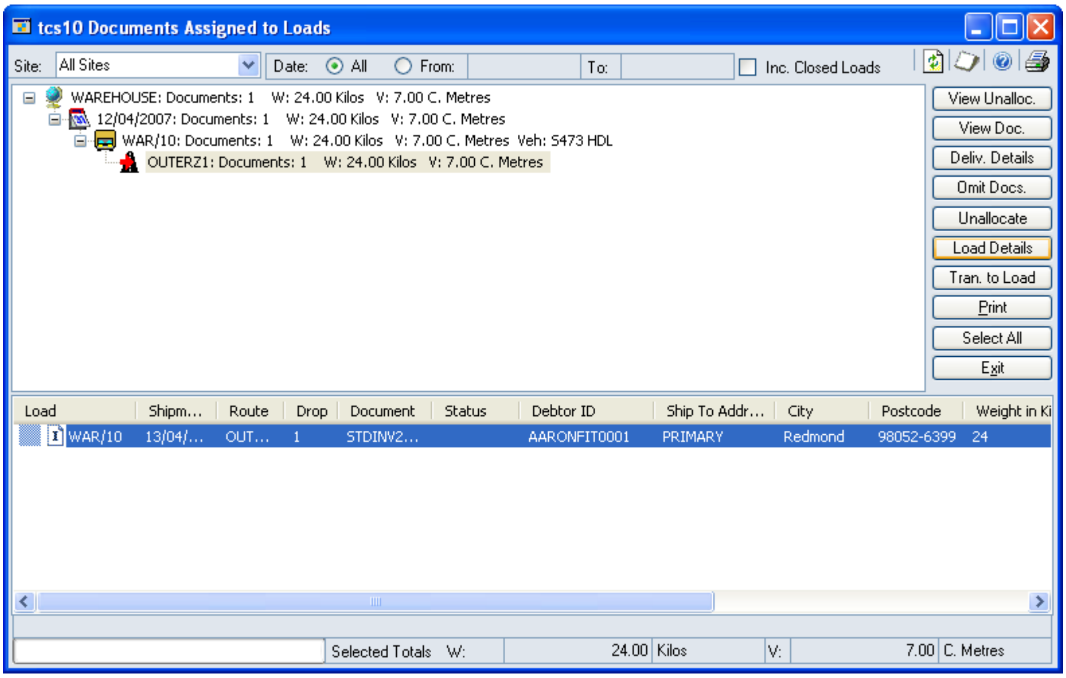
Transactions >> Myridas >> Load Planning >> Docs on loads

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 then this window will display and allow processing of returns documents as "Collections". It will also display the collection status of returns documents.

The Documents Assigned To Loads window



12.1 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 will be available to select. When you select a site, no other user will be able to 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 will be 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 organised initially by site, then by load date, by load and finally by route. The total number of documents, total weight and total volume is 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. When a load or route is selected, all associated documents are displayed in the lower half of the window in the list view.

The list view is divided into fourteen columns: Load, Shipment Date, Route, Drop, Document No, Document Status, Debtor ID, Ship To Address, City, Postcode, Weight, Volume, Number of parcels and Debtor 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 Enquiry Zoom window. If a document requires delivery booking and a booking has not been made, a warning icon will be 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 will be 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 will open.

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 Enquiry Zoom window will open.

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 will open.

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 will open.

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 will open.

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.

13. Load Header Maintenance Window

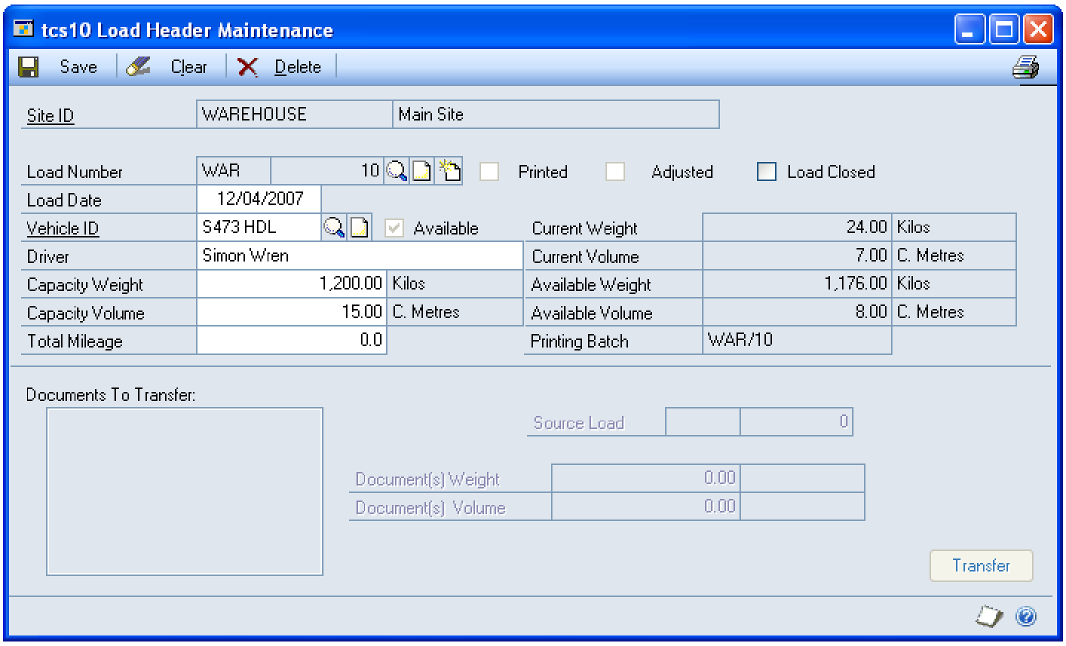
Documents Assigned To Loads window >> Click the Load Details button or the Tran. to Load button

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.

The Load Header Maintenance window



13.1 Creating and Editing Loads

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

The window will open 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 will displayed in the window.

To specify a new Load number:

- Click the Take next load number button. The next available number will be displayed.

2. Enter a Load Date. The load date will normally be the ship date. However, if multiple despatches with different delivery dates are being sent out in the same load, it may be more useful to enter a despatch or loading date. This date will be 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 will be 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 will be asked if you want to create it.

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

4. If required, edit the name of the Driver. Note that any changes will only affect this load.
5. If required, edit the Capacity Weight. Note that any changes you make will only affect this load.
6. If required, edit the Capacity Volume. Note that any changes you make will only affect this load.
7. Click the Save button to save the load details.

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

Deleting load records

Click the Delete button to delete a load record. Note that a load will not be 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.

13.2 Transferring Documents between Loads

The transfer functionality in the Load Header Maintenance window will only be 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 section Creating and editing loads. This will be the destination load.
2. Click the Save button (if you create or edit a load).

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

3. Click the Transfer button.

The Load Header Maintenance window will close and you will be returned to the Documents Assigned To Loads window. Click Refresh to update changes.

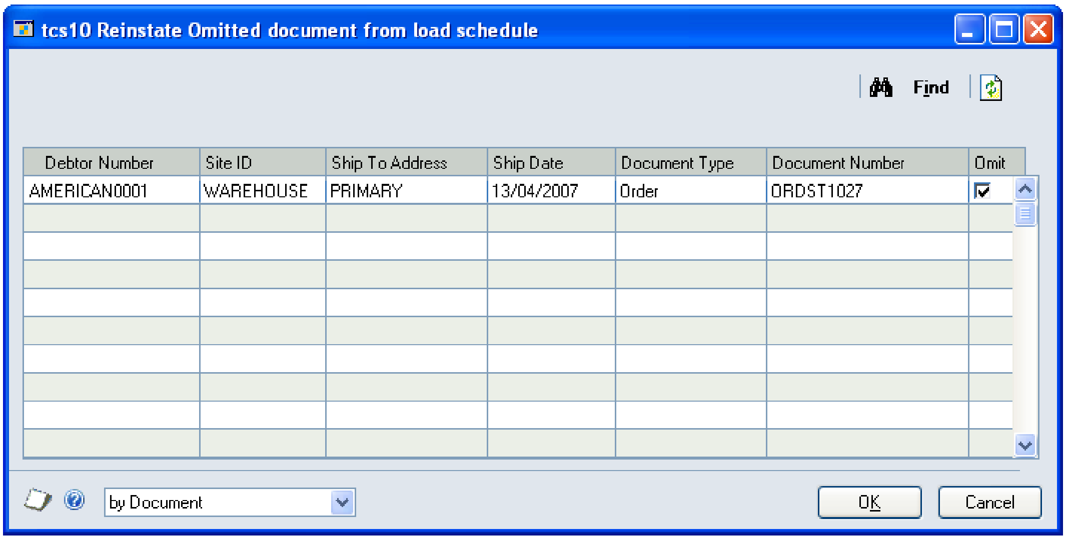
14. Reinstate Omitted Document From Load Schedule Window

Transactions >> Myridas >> Load Planning >> Reinstate Omitted Documents

Use the Reinstate Omitted Document From Load Schedule window to:

- Restore an excluded document to the Load planning schedule

The Reinstate Omitted Document From Load Schedule window



14.1 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 will open displaying all documents that have been omitted from Load planning. The debtor ID, site ID, ship to address, ship date, document type and document number for each document will be 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 check box 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.

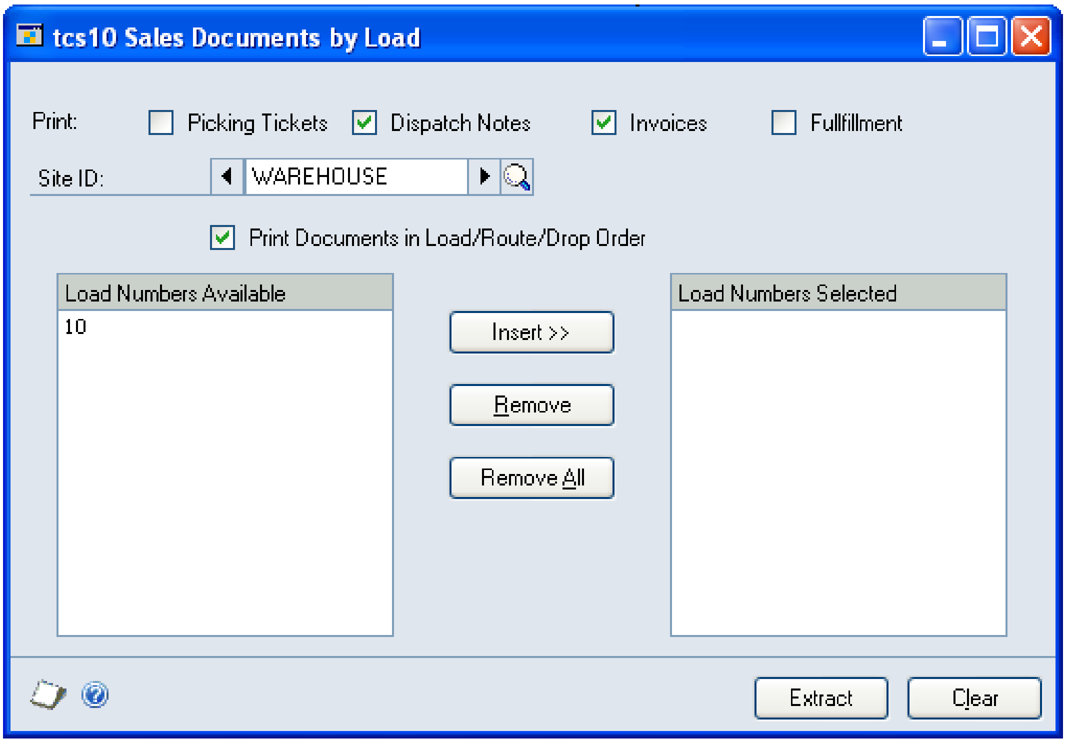
15. Sales Documents by Load Window

Transactions >> Myridas >> Load Planning >> Pick and Despatch by Load

Use the Sales Documents by Load window to:

- Print sales documents by load

The Sales Documents by Load window



15.1 Printing Sales Documents by Load

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

1. Click the check boxes to select to print picking lists, despatch notes, invoices or fulfillment orders. If required you can select multiple document types simultaneously.
2. 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 will be displayed in the Load Number Available scrolling window.
3. By default documents will be printed out in sales order document number sequence. Select the Print Documents in Route/Drop Order to print documents out in load sequence. Documents will be printed by drop order for each route and by route order for each load. When printing documents for multiple loads they will be sequenced by load number.
4. Click on a load number in the Load Number Available scrolling window and click Insert. The load number will be 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.

5. Click the Extract button to start the extraction of documents to the appropriate batch (see Creating and maintaining loads). The batch will be passed into the Sales Document Printing window.

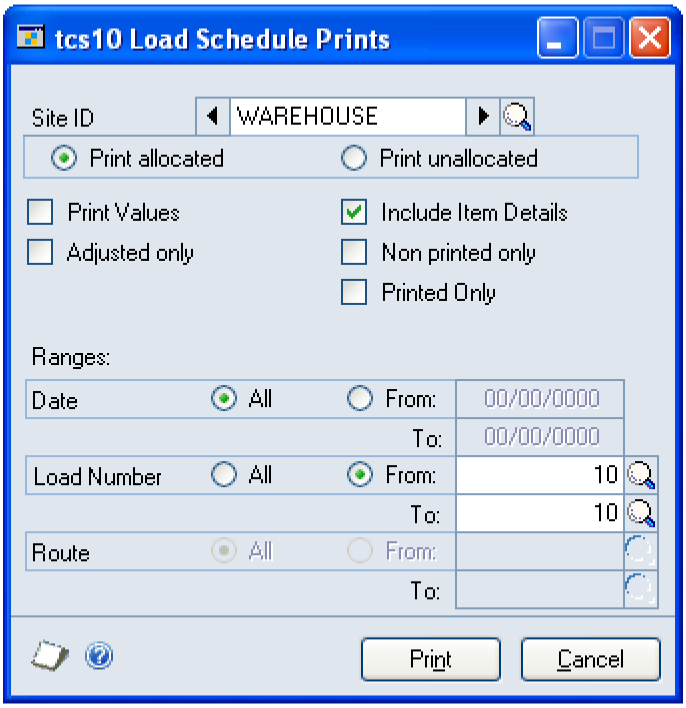
16. Load Schedule Prints Window

Transactions >> Myridas >> Load Planning >> Print Loads

Use the Load Schedule Prints window to:

- Print load schedules

The Load Schedule Prints window



16.1 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 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 check box. If this check box is selected, details will be printed for each item.
4. Select or clear the Print Values check box. If this check box is selected, all item line details will be printed. This option is only available if the Include Item Details check box 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 check box. Adjusted documents are documents that have been altered since they were originally printed.
6. Enter From and To dates to specify a Date range, or select All to specify all dates. This 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 will be 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 specifies which load numbers will be included. This 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 specifies which routes will be included.
9. Click the Print button and enter your print options in the Report Destination window.

Example of a driver's load sheet

Page Number: 1
User ID: sa

Fabrikam, Inc.

03/11/2004 13:52:40

Vehicle Details:
S473 HDL
Simon doesn't do weekend deliveries
Simon Wren
1,200.00 Kilos
15.00 C. Metres

Schedule for Load:
WAR /10
WAREHOUSE

Load Totals:
Weight 24.00Kilos
Volume 7.00 C. Metres
Documents 1

Route: OUTERZ1 Outer Town Zone 1
Drop: 1

Document	Address		Parcels	Weight / Volume
STDINV2274	Aaron Fitz Electrical One Microsoft Way Redmond WA 98052-6399	Del. Details: Sunday deliveries not before 11:00.	1	24.00 Kilos 7.00 C. Metres
Tel: 42555501010000		Contact: Bob Fitz		
24X IDE	24x CD-ROM		20 Each	

Signature ______________________

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

17. 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 Myridas 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 that you want to print picking lists for.

Routines

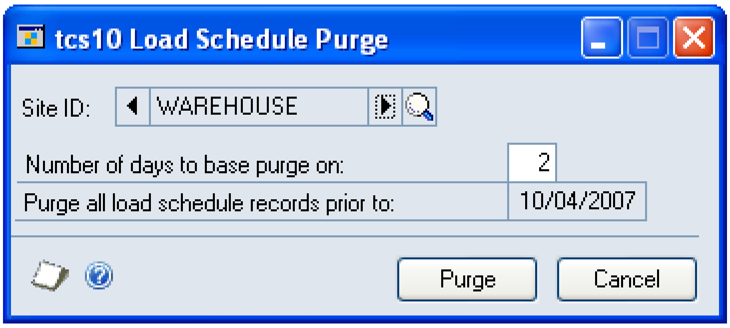
18. Load Schedule Purge Window

Tools >> Routines >> Myridas >> 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

The Load Schedule Purge window



18.1 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 will be 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 will be displayed, showing a progress indicator. All load records older than the specified date will be deleted.

Appendix A

Access to Myridas Windows

Vehicle Load Planning

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 >> Extras >> 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 >> Myridas >> Load Planning >> Docs on loads	Documents Not Assigned To Loads window >> View Alloc. button
Documents Not Assigned to Loads	Transactions >> Myridas >> Load Planning >> Docs not on loads	
Extra Address Information Maintenance	Cards >> Myridas >> Load Planning >> Extra Address Details	
Extra Site Details	Cards >> Myridas >> Load Planning >> Extra Site Details	
Item U of M Load Details	Cards >> Myridas >> Load Planning >> Item Load Details	Item Maintenance window >> Extras >> 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 >> Myridas >> Load Planning >> Setup	
Load Schedule Prints	Transactions >> Myridas >> Load Planning >> Print Loads	Documents Assigned/Not Assigned to Loads windows >> Click the Print button
Load Schedule Purge	Tools >> Routines >> Myridas >> Load Planning >> Purge Loads	
Load Schedule Route Maintenance	Tools >> Setup >> Myridas >> Load Planning >> Routes	
Reinstate Omitted Document from Load Schedule	Transactions >> Myridas >> Load Planning >> Reinstate Omitted Documents	
Sales Documents by Load	Transactions >> Myridas >> Load Planning >> Pick and Despatch by Load	
Service Level Maintenance	Tools >> Setup >> Myridas >> Load Planning >> Service Levels	
Vehicle Maintenance	Tools >> Setup >> Myridas >> Load Planning >> Vehicle Maintenance	

Appendix B

Modified Microsoft Dynamics™ GP Windows

Some Microsoft Dynamics™ GP windows have been modified to incorporate Myridas behaviour:

Window Name	**Series**	**Myridas 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 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 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

Myridas Reports

Myridas provides multiple reports to increase information visibility.

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

Myridas provides an additional window to enable you to unlock any sites that may have become locked for load planning in the event of a system downage.

1. Open the Unlock Sites window (Tools >> Routines >> Myridas >> Load Planning >> Unlock Sites).

2. Select a site from the drop-down menu.

3. The status of the site will be displayed. If the site is locked then click the Unlock Site button to unlock the site.

4. Click OK to close the window.

Index

A

Advanced Picking 36
Assigning
  documents to loads 22
  weights and volumes to items 13
Automatic load creation 23
Automatic Load Creation window 23

B

Booking date 17
Bulk picking lists 36

C

Creating
  loads 21, 29
  loads automatically 23
  routes 11
  service levels 9
  vehicle details 10

D

De-allocating documents from loads 28
Deleting
  load records 22, 30
  routes 11
  service levels 9
  site details 12
  vehicle details 10
Document Delivery Details window 16
Documents Assigned To Loads window 26
  list view 27
  tree view 27
Documents Not Assigned To Loads window 18
  list view 19
  tree view 19
Drop numbers 15, 17

E

Extra Address Information Maintenance window
  Load planning version 14
Extra Site Details window 12

I

Item U of M Load Details window 13

L

Load date 30
Load Header Maintenance window 29
Load Maintenance window 21
Load numbers 12, 21
Load planning 6
  automatically creating loads 23
  booking date 17
  creating loads 21
  de-allocating documents 28
  drop numbers 15
  load date 30
  load numbers 12
  number of parcels 17
  omit documents 17, 20
  purging load records 37
  reinstating documents 31
  routes 7
  service levels 6, 9
  switching it on for a customer 14
  transferring documents between loads 28, 30
  transferring multiple orders to invoices for specific routes 20
  vehicle details 6
Load records
  deleting 22
Load Schedule Prints window 34
Load Schedule Purge window 37
Load Schedule Route Maintenance window 11
Load schedules
  printing 34
Loads
  automatically creating loads 23
  creating 21

O

Omit documents 17, 20

P

Printing
  load schedules 34
  picking lists by load 36
  sales documents by load 32
Purging
  load records 37

R

Reinstate Omitted Document From Load Schedule window 31
Reinstating
  documents to load planning 31
Routes 7
  creating 11

deleting 11

S

Sales Dcouments by Load window..... 32
Sales documents
printing 32
Service Level Maintenance window..... 9
Service levels 6, 9
creating 9
deleting 9
Site details
deleting 12
System volume unit 8
System weight unit.............................. 8

T

Transferring
documents between loads......... 28, 30

V

Vehicle details 6
creating.. 10
deleting.. 10
Vehicle Maintenance window 10
Viewing
the load schedule 26
Volume 8

W

Weight 8