

Scheduling

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Summary

Use this screen to schedule deliveries; this is to be used when completing deliveries using your own vehicles.

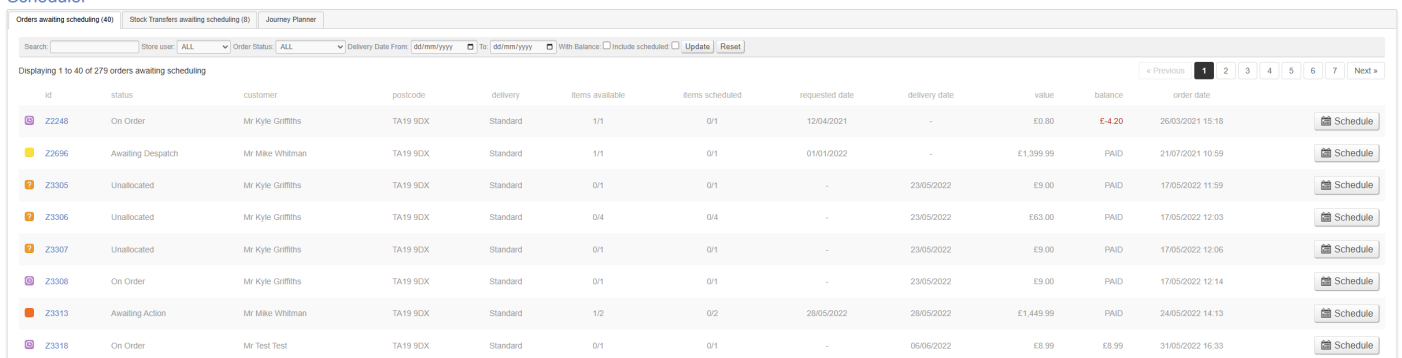
To use this section, you must have created [Lorry Journeys](#)

It is also possible to Schedule a Sales Order from the [Sales Order Detail](#) page

Orders awaiting Scheduling

This tab shows a list of Sales Orders which are awaiting scheduling.

Scheduler



The screenshot shows the Scheduler interface with a table of orders. The table has columns for ID, status, customer, post.code, delivery, items available, items scheduled, requested date, delivery date, value, balance, and order date. There are 8 rows of data, each with a 'Schedule' button.

id	status	customer	post.code	delivery	items available	items scheduled	requested date	delivery date	value	balance	order date	
Z2248	On Order	Mr. Kylie Griffiths	TA19 9DX	Standard	1/1	0/1	12/04/2021	-	£0.80	£-4.20	26/03/2021 15:18	Schedule
Z2696	Awaiting Despatch	Mr. Mike Whitman	TA19 9DX	Standard	1/1	0/1	01/01/2022	-	£1,399.99	PAID	21/07/2021 10:59	Schedule
Z3305	Unallocated	Mr. Kylie Griffiths	TA19 9DX	Standard	0/1	0/1	-	23/05/2022	£9.00	PAID	17/05/2022 11:59	Schedule
Z3306	Unallocated	Mr. Kylie Griffiths	TA19 9DX	Standard	0/4	0/4	-	23/05/2022	£63.00	PAID	17/05/2022 12:03	Schedule
Z3307	Unallocated	Mr. Kylie Griffiths	TA19 9DX	Standard	0/1	0/1	-	23/05/2022	£9.00	PAID	17/05/2022 12:06	Schedule
Z3308	On Order	Mr. Kylie Griffiths	TA19 9DX	Standard	0/1	0/1	-	23/05/2022	£9.00	PAID	17/05/2022 12:14	Schedule
Z3313	Awaiting Action	Mr. Mike Whitman	TA19 9DX	Standard	1/2	0/2	28/05/2022	28/05/2022	£1,449.99	PAID	24/05/2022 14:13	Schedule
Z3318	On Order	Mr. Test Test	TA19 9DX	Standard	0/1	0/1	-	06/06/2022	£8.99	£8.99	31/05/2022 16:33	Schedule

Eligibility

To be included in this list, a Sales Order must meet certain criteria:

- It must be an Active Sales Order (e.g. have one or more lines which are not Cancelled/Returned/Delivered, and where the Sales Order is a valid order, e.g. not a Quote or an Abandoned order)
- It must have a [Postage Type](#) which is marked as 'Available for Lorry Loader'

Filters

By default, this will show all eligible Sales Orders, but a user may apply various filters. This allows the user to search for a particular Sales Order, to filter by Store User or Order status, as well as by Delivery Date.

If you need to reschedule a Sales Order, be sure to tick the box for 'include scheduled'

Sales Order Information

Most of this information is self explanatory, but more information is available below.

Items Available

This column shows the total number of items ordered by the Customer, as well as the total number of items available in the business to fulfil the Sales Order.

For example, if this shows as '2/7', that means that the Customer order seven items, but only two are available for immediate fulfilment.

To show in the Order Status 'Fully Available' filter, it is necessary for all items to be available, e.g. this column should read '7/7'

Items Scheduled

This column shows the total number of items scheduled from this Sales Order.

For example, if this shows as '2/7', that means that only two out of the seven items the Customer has ordered have actually been Scheduled.

It is possible to schedule multiple items from the same Sales Order across multiple dates and journeys

Stock Transfers awaiting Scheduling

This tab shows a list of Stock Transfers that require Scheduling. This is intended for use when companies use their own vehicles to complete inter branch transfers.

This is an optional element of Stock Transfers; these can be managed solely via the Stock Transfer screen

Scheduler

transfer no.	status	source	destination	items received	
83	In Transit	UK Warehouse	Dublin	0/1	Schedule
82	In Transit	Test	UK Warehouse	0/1	Schedule
81	In Transit	UK Warehouse	Bristol	1/1	Schedule
80	Open	Manchester	Bristol	0/1	Schedule
78	In Transit	UK Warehouse	UK Warehouse	1/1	Schedule

A Stock Transfer may be Scheduled in the same way as a Sales Order.

Journey Planner

This tab shows you a summary of your Lorry Journeys over a calendar period; the default view is the current fortnight.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8th	9th	10th	11th	12th	13th	14th
Lorry 1 (0 drops) Lorry 2 (0 drops)	Lorry 1 (0 drops) - <i>locked</i> Lorry 3 (0 drops)	Lorry 1 (0 drops) Lorry 2 (0 drops) Lorry 3 (0 drops)	Lorry 3 (0 drops)	Lorry 3 (0 drops)	Lorry 2 (0 drops)	Local Deliveries (0/2 drops) Lorry 3 (0 drops)
15th	16th	17th	18th	19th	20th	21st
Lorry 1 (0 drops) Lorry 2 (0 drops)	Lorry 1 (0 drops) Lorry 3 (0 drops)	Lorry 1 (0 drops) - <i>locked</i> Lorry 2 (0 drops) Lorry 3 (0 drops)	Lorry 3 (0 drops)	Lorry 3 (0 drops)	Lorry 2 (0 drops)	Local Deliveries (0/2 drops) Lorry 3 (0 drops)

For more information on how this tab works, click [here](#).

From this screen, you can mark Sales Orders as Despatched.

How to Schedule a Sales Order/Stock Transfer

Note that this process can work for both Stock Transfers and Sales Orders [Stores](#)

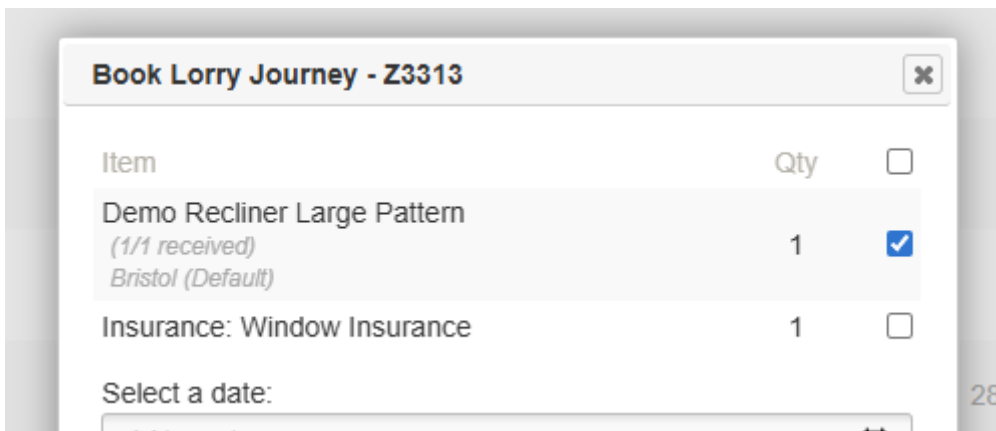
1. Press the Schedule button

This is found on the Scheduler screen, but may also be found on the [Sales Order Detail](#) screen, the [POS](#) screen, and the [Stock Transfer Detail](#) screen.

2. Select the items you wish to Schedule

Use the tick boxes to confirm which items you wish to Schedule

In the case of Stock Transfers, all items must be Scheduled simultaneously



3. Select the date of delivery

Choose the date you would like to use for delivery.

It may be useful to have the Journey Planner open in a separate tab, as this will assist you when looking for availability.

4. Select a Lorry

Select a Lorry Journey that is available on that specific date.

Your selection will be restricted based on the Postage Zones which that [Lorry Journey](#) includes.

In the case of a Stock Transfer, the postcode of the destination Store will be used determine which Postage Zone is required

5. Select a timeslot

Select a timeslot for this delivery.

This is optional.

This will require timeslots being set up against the [Lorry Journey](#)

6. Confirm selection

Click to confirm your selection.

The booking will now appear on the Journey Planner.

Journey Planner

From this tab, you can:

- view a summary of all booked deliveries and Lorry Journeys over a two week period
- lock and unlock Lorry Journeys
- review Lorry Journeys where a booked delivery has an outstanding balance

You can also click in to see a 'day view', which will provide a detailed view of all Lorry Journeys and scheduled deliveries for a given day. From this screen, you can:

- resequencing deliveries
- reschedule deliveries
- cancel deliveries
- mark deliveries as completed
- print picking lists
- print delivery notes
- deliver individual lines


Key to icons

 = this Lorry Journey contains a booked delivery with an outstanding balance

 = this Lorry Journey is unlocked, e.g. it is possible to book deliveries onto it

 = this Lorry Journey is locked, e.g. it is not possible to book deliveries onto it

 = this Lorry Journey contains a Sales Order which is Awaiting Action

 = the scheduled date is different to the customer's requested delivery date

Summary View

This shows a fortnightly summary.

Orders awaiting scheduling (40) | Stock Transfers awaiting scheduling (8) | Journey Planner

8th December 2025 - 21st December 2025

« Previous | Next »

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8th Lorry 1 (0 drops) Lorry 2 (0 drops)	9th Lorry 1 (0 drops) - locked Lorry 3 (0 drops)	10th Lorry 1 (0 drops) Lorry 2 (0 drops) Lorry 3 (0 drops)	11th Lorry 3 (4 drops)	12th Lorry 3 (0 drops)	13th Lorry 2 (0 drops)	14th Local Deliveries (02 drops) Lorry 3 (0 drops)
15th Lorry 1 (0 drops) Lorry 2 (0 drops)	16th Lorry 1 (0 drops) Lorry 3 (0 drops)	17th Lorry 1 (0 drops) - locked Lorry 2 (0 drops) Lorry 3 (0 drops)	18th Lorry 3 (0 drops)	19th Lorry 3 (1 drop)	20th Lorry 2 (0 drops)	21st Local Deliveries (02 drops) Lorry 3 (0 drops)

Detail View

To access this mode, click the 'view' button on the summary view; there is one per day.

Lorry Journey Schedule - 11/12/2025

Lorry 3 (4 drops) Lock

Afternoon						
Name	City	Postcode	Order No.	Phone No.	No. of Items	Balance
Mr Kyle Griffiths	Ilminster	TA19 9DX	Z2248		1	£-4.20
Miss Hannah Buckler	Ilminster	TA19 9DX	Z3349	01460 258530	1	£5.00
hannah buckler	Wolverhampton	W12 4LQ	Z3471	0123456789	4	£0.00
Morning						
Name	City	Postcode	Order No.	Phone No.	No. of Items	Balance
Mr Mike Whitman	Ilminster	TA19 9DX	Z3313	01321657987	2	£0.00

print picking list | print delivery note | deliver individual lines

Resequencing Deliveries

This should be done to confirm the route for your drivers; sequence the orders to match their route

To sequence deliveries, simply drag and drop them to change the order; this order will be reflected on the Picking Lists, and when printing the Delivery Note.

Lorry Journey Schedule - 11/12/2025


Lorry 3 (4 drops) Lock

Afternoon						
Name	City	Postcode	Order No.	Phone No.	No. of Items	Balance
Mr Kyle Griffiths	Ilminster	TA19 9DX	Z2248		1	£-4.20
hannah buckler	Wolverhampton	W12 4LQ	Z3471	0123456789	4	£0.00
Morning						
Miss Hannah Buckler	Ilminster	TA19 9DX	Z3349	01460 258530	1	£5.00
Mr Mike Whitman	Ilminster	TA19 9DX	Z3313	01321657987	2	£0.00

print picking list | print delivery note | deliver individual lines

When doing this, it is possible to drag and drop a delivery between different Lorry Journeys on the same day.

Reschedule Deliveries

To reschedule a specific delivery, click the  icon.

Cancel Deliveries

To cancel a specific delivery, click the  icon.

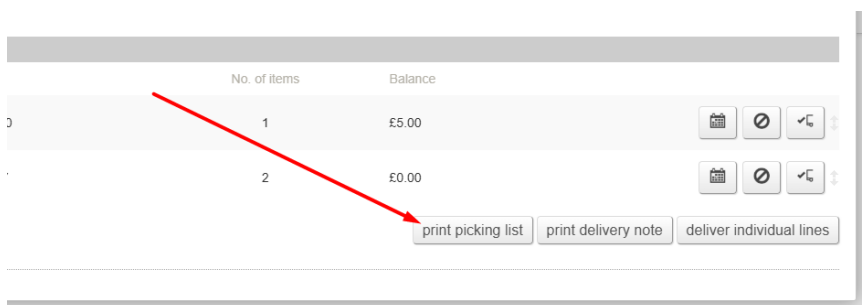
Once cancelled, it will fall into the awaiting scheduling list.

Mark Deliveries as Completed

To mark a delivery as complete, click the  icon.

Print Picking Lists

From this screen you can print [Picking Lists](#) per Lorry Journey.



Print Delivery Notes

From this screen you can print [Delivery Notes](#) per Lorry Journey.

No. of Items	Balance	
1	£5.00	
2	£0.00	

Deliver Individual Lines

You can also deliver individual lines. Use this to mark individual lines within a Sales Order as delivered.

This should be used if delivery was unsuccessful