

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

id	status	customer	postcode	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 Dispatch	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.

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