10) Tips and Tricks

- Forwarders' work surface (F8)
- E-mail alerts
- Order information in foreign language
- Client address in foreign language
- How to change the Document's sequence number
- Work with several companies
- Access shortcut to another company's database OZOLS TMS
- How to Delete ferry ticket

Forwarders' work surface (F8)

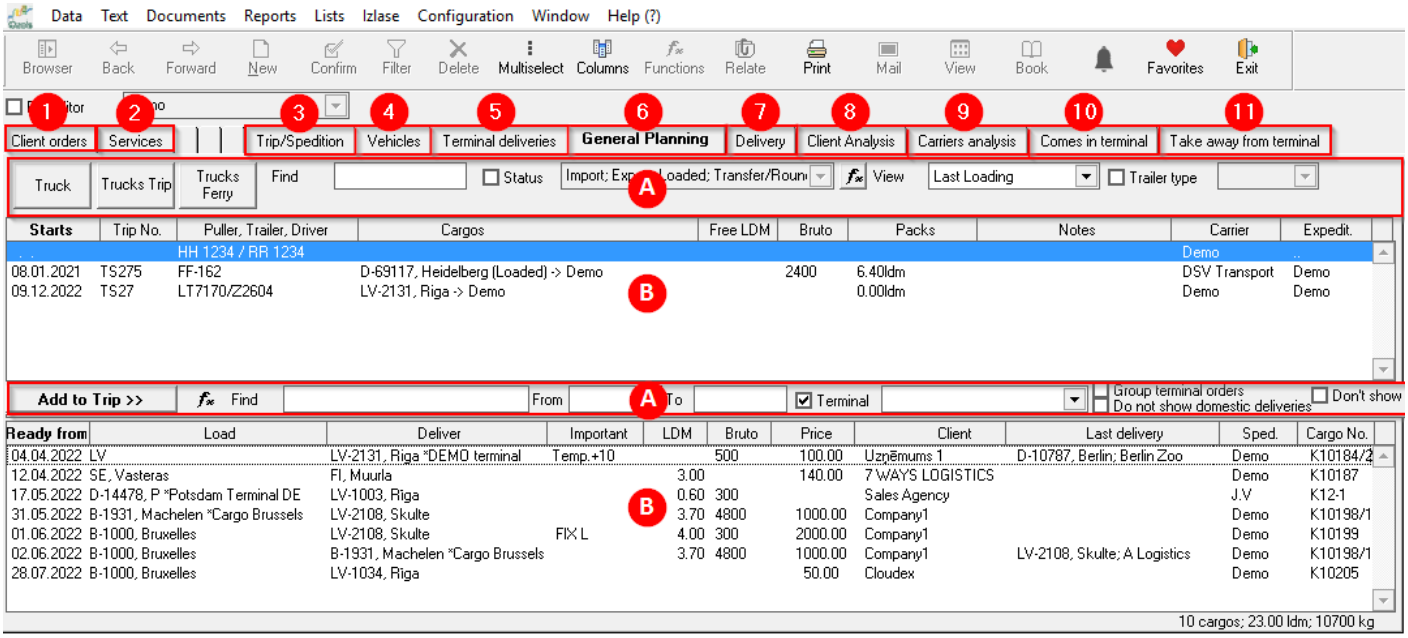
> The Forwarder surface is created specifically at the request of our customers and combines functions that are directly related to the freight forwarder's work. It provides an opportunity to quickly select the necessary records with the help of filters, to plan and manage the Forwarder's work.

> Forwarders work surface is **opened** by pressing **Function key F8** , or **Main menu** > **Window** > **Forwarders desktop**

The forwarder desktop includes:

1. **Client orders** : All customer orders together;
2. **Services** : All services provided together;
3. **Trip/Spedition**: All Trip/Speditions and their cargo;
4. **Vehicles**: all information about your and contractors' machines;
5. **Terminal deliveries** : Trip planning for terminal cargo;
6. **General planning**: Adding loads to flights;
7. **Delivery** : Current trips and it's cargo information;
8. **Client Analysis**: Work with clients - frequency, volumes, settlements, etc.;
9. **Carrier analysis**: Together, the directions of the carriers, profitability, etc. are visible;
10. **Comes in terminal** : Operations with incoming cargo (status, CMR labels, etc.);
11. **Takes away from the terminal** : Operations with outgoing cargo (status, CMR labels, etc.);

A) **Filters** for record selection;
B) Selected **Entries** .


Data Text Documents Reports Lists Izlase Configuration Window Help (?)
Browser Back Forward New Confirm Filter Delete Multiselect Columns Functions Relate Print Mail View Book Favorites Exit
1
2
3
4
5
6
7
8
9
10
11
Client orders
Services
Trip/Spedition
Vehicles
Terminal deliveries
General Planning
Delivery
Client Analysis
Carriers analysis
Comes in terminal
Take away from terminal
Truck
Trucks Trip
Trucks Ferry
Find
Status
Import; Exp Loaded; Transfer/Roun
View
Last Loading
Trailer type
A
Starts
Trip No.
Puller, Trailer, Driver
Cargos
Free LDM
Bruto
Packs
Notes
Carrier
Expedit.
HH 1234 / RR 1234
Demo
08.01.2021 TS275 FF-162 D-69117, Heidelberg (Loaded) -> Demo 2400 6.40ldm DSV Transport Demo
09.12.2022 TS27 LT7170/Z2604 LV-2131, Riga -> Demo 0.00ldm Demo Demo
B
Add to Trip >>
Find
From
To
Terminal
Group terminal orders
Do not show domestic deliveries
Don't show
A
Ready from
Load
Deliver
Important
LDM
Bruto
Price
Client
Last delivery
Sped.
Cargo No.
04.04.2022 LV LV-2131, Riga *DEMO terminal Temp.+10 500 100.00 Uzņēmums 1 D-10787, Berlin; Berlin Zoo Demo K10184/2
12.04.2022 SE, Vasteras FI, Muurla 3.00 140.00 7 WAYS LOGISTICS Demo K10187
17.05.2022 D-14478, P *Potsdam Terminal DE LV-1003, Riga 0.60 300 Sales Agency J.V K12-1
31.05.2022 B-1931, Machelen *Cargo Brussels LV-2108, Skulte 3.70 4800 1000.00 Company1 Demo K10198/1
01.06.2022 B-1000, Bruxelles LV-2108, Skulte FIX L 4.00 300 2000.00 Company1 Demo K10199
02.06.2022 B-1000, Bruxelles B-1931, Machelen *Cargo Brussels 3.70 4800 1000.00 Company1 LV-2108, Skulte; A Logistics Demo K10198/1
28.07.2022 B-1000, Bruxelles LV-1034, Riga 50.00 Cloudex Demo K10205
B
10 cargos; 23.00 ldm; 10700 kg

E-mail alerts

> Ozols TMS already has standard automatic alerts set up by default, which are sent to the responsible persons by email. However, it is also possible to set them up individually for each user of OZOLS TMS.

Warnings are divided into:

1. User orders (created by user)
2. Orders available to the user (e.g. head of department)
3. Orders of all users (e.g. company manager)

Standard automatic warnings:

1. Prepaid invoices **are not paid until loading**
2. **The revenue** of the customer's order does not match the total amount of the issued invoices
3. Delivered cargo **has not** been **invoiced**
4. For customers whose **order** volume **decreases** or increases
5. **No prepaid** invoices issued
6. For open flights , the amount of cargo specified in the Customer's order **does not match** with what entered or left the warehouse
7. Cargo **is not added to the trip**
8. Cargo has been **added to the** trip
9. **Payment** for invoice **received**
10. Information **about debtors**

Additional warnings:

1. Orders for which POD (**CMR**) **is not sent**
2. Orders for which POD (**CMR**) **is not received**
3. Customers **credit limit is approaching or has already been exceeded**
4. No invoice **received** within 60 days
5. **No data entered** for own trips
6. Documents are missing **postings**
7. Unsent **invoices**
8. Cargo **is not included in the trip**
9. Permission expiry dates **for Cars/Trailers**
10. **Birthdays of** client contact persons

Order information in foreign language

Because clients and suppliers are from different countries, documents often need to include information in a foreign language.

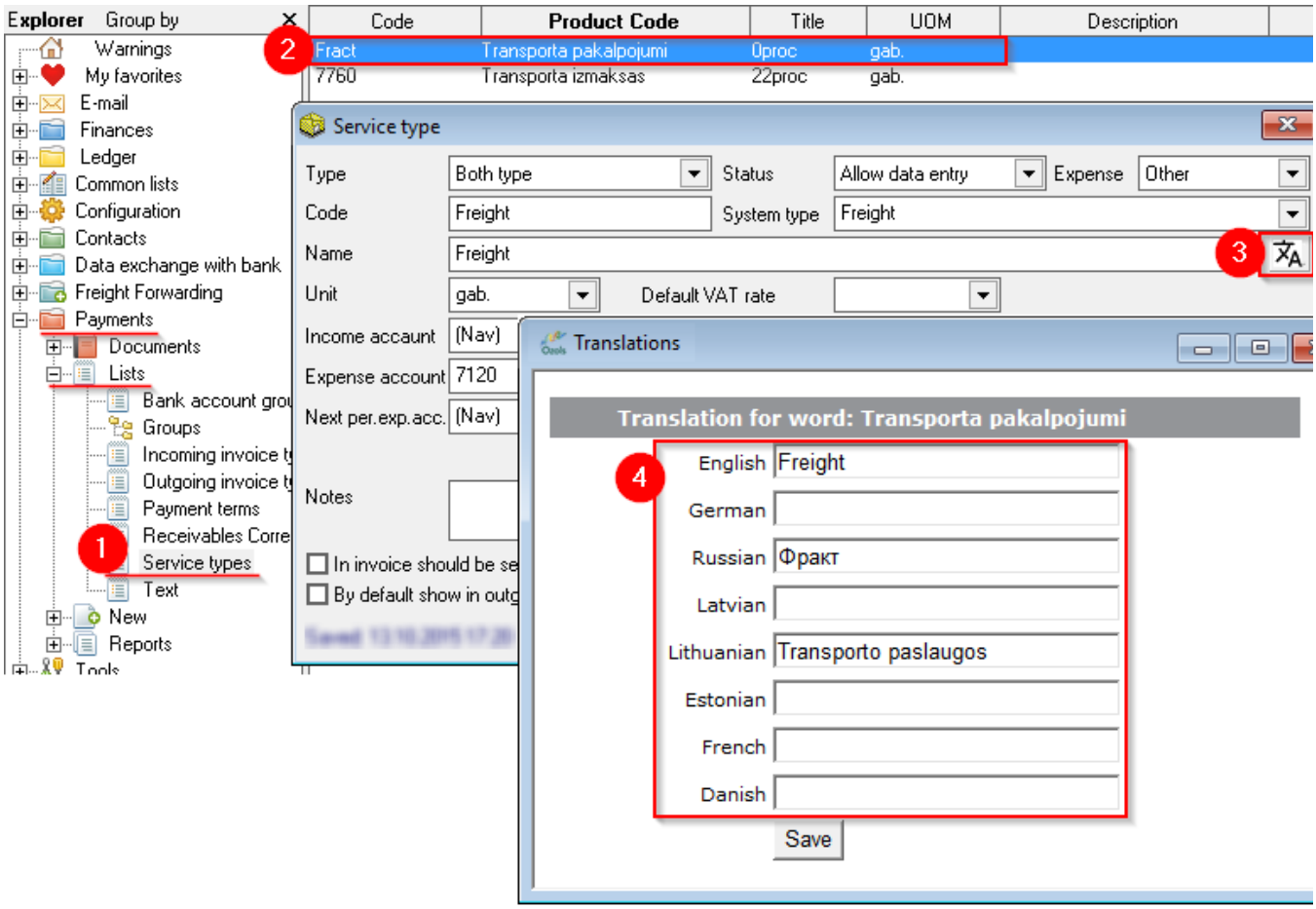
> Ozols TMS allows translation in client's language, for example content of invoice - **Type of service; VAT rate explanation; Payment term**

How to translate information into the client's language?

> 1. Translation is possible for fields that have a symbol  on the right side. It opens a window where you can enter the required translation.

Service type translation into a foreign language

1. **OZOLS > Payments > Lists > Service types**
2. Choose the service that needs translation
3. Press the translate button 
4. Fill in the translation in corresponding language


Explorer
Group by
Warnings
My favorites
E-mail
Finances
Ledger
Common lists
Configuration
Contacts
Data exchange with bank
Freight Forwarding
Payments
Documents
Lists
Bank account grou
Groups
Incoming invoice t
Outgoing invoice t
Payment terms
Receivables Corre
Service types
Text
New
Reports
Tools
1
Code
Product Code
Title
UOM
Description
2
Fract
Transporta pakalpojumi
0proc
gab.
7760
Transporta izmaksas
22proc
gab.
Service type
Type
Both type
Status
Allow data entry
Expense
Other
Code
Freight
System type
Freight
Name
Freight
3
Unit
gab.
Default VAT rate
Income accaunt
(Nav)
Expense account
7120
Next per.exp.acc.
(Nav)
Notes
In invoice should be se
By default show in outg
Translations
Translation for word: Transporta pakalpojumi
4
English
Freight
German
Russian
Фракт
Latvian
Lithuanian
Transporto paslaugos
Estonian
French
Danish
Save

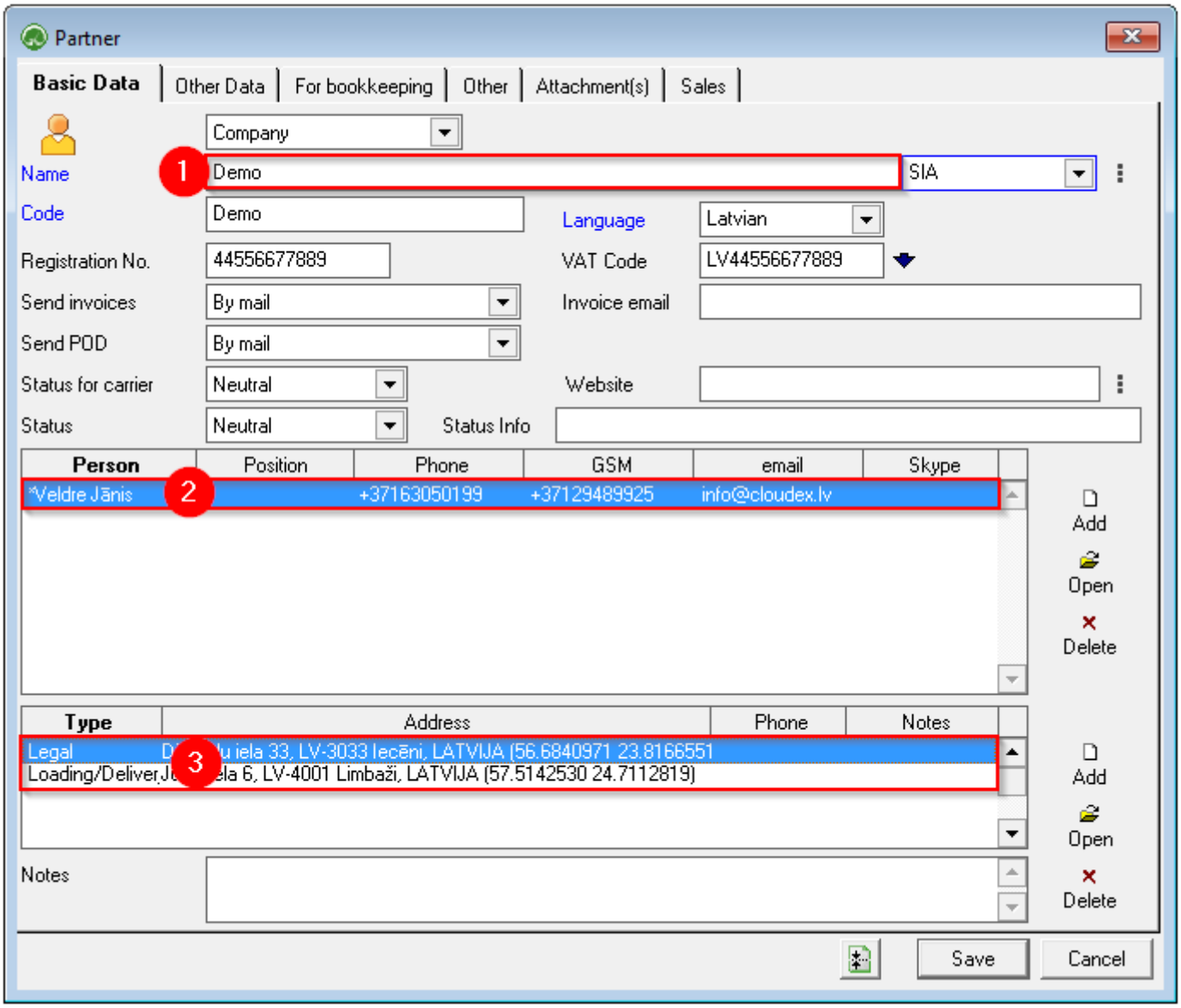
Client address in foreign language

> Outgoing documents can include the Partner's contact details in a foreign language. To set this :
> 1) Indicate the preferred language of contact on the Client Card;
> 2) Translation of the contact details.

Ozols > Contacts > Lists > All partners > [Open Partner card]

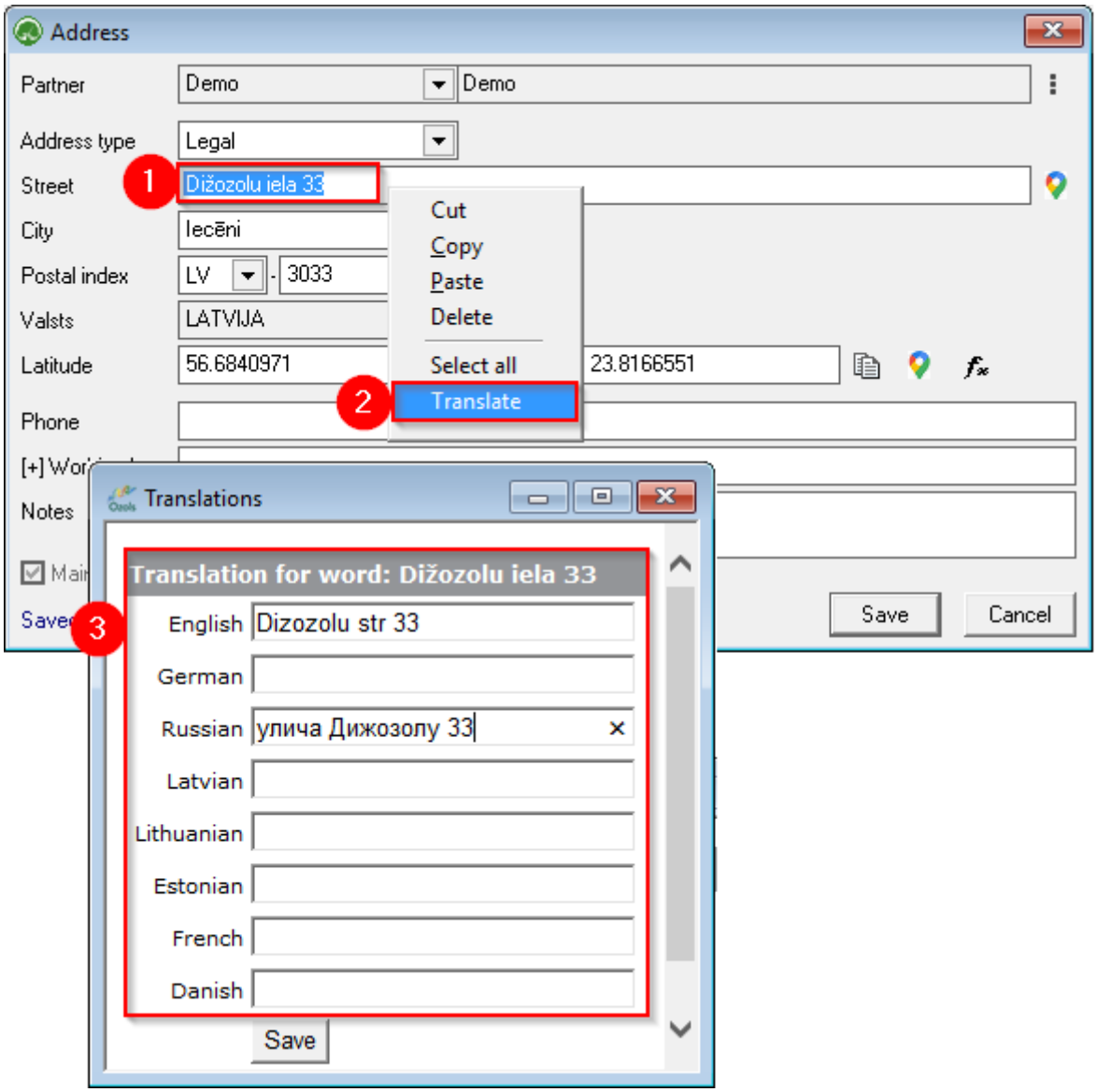
Translation is available for the following fields of the Partner card:

1. Company Name
2. Contact person
3. Address



To enter a translation:

1. Select the desired field and press **the right mouse button** ;
2. A window opens in which you choose **translate** ;
3. **Make an entry** in the desired language and save.



> In future outgoing documents, OZOLS TMS will insert contact information in the Partner's language.

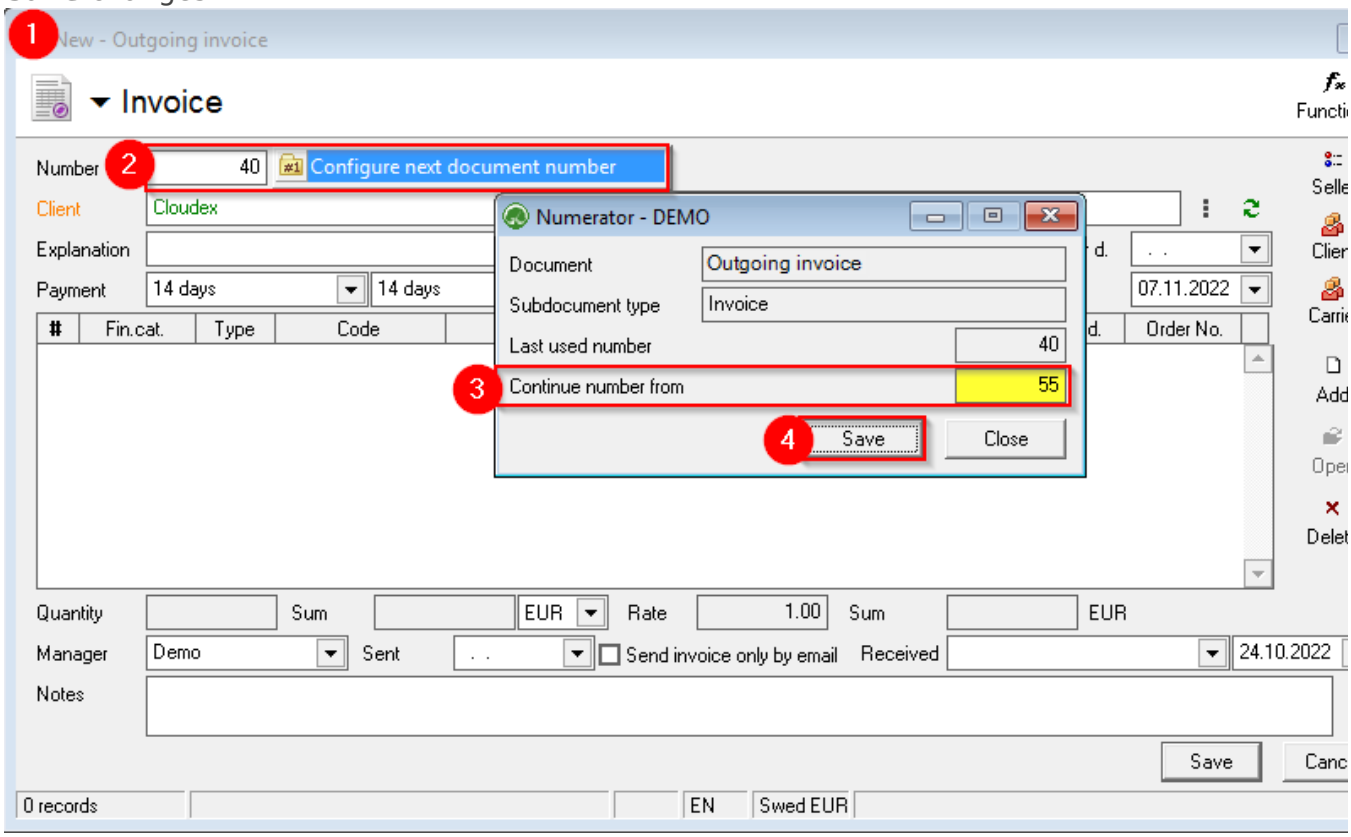
See also:

Information in the client's language - foreign language
Contract terms in the customer's foreign language

How to change the Document's sequence number

> For documents that have automatic sequential numbering, it is possible to set the number of the next document.

1. **Open** the desired document (e.g. outgoing invoice)
2. In the **Number** window, press **the right mouse button** . A window opens - **Configure next document number**
3. In **the Continue numbering from** window, enter the desired number
4. **Save** changes



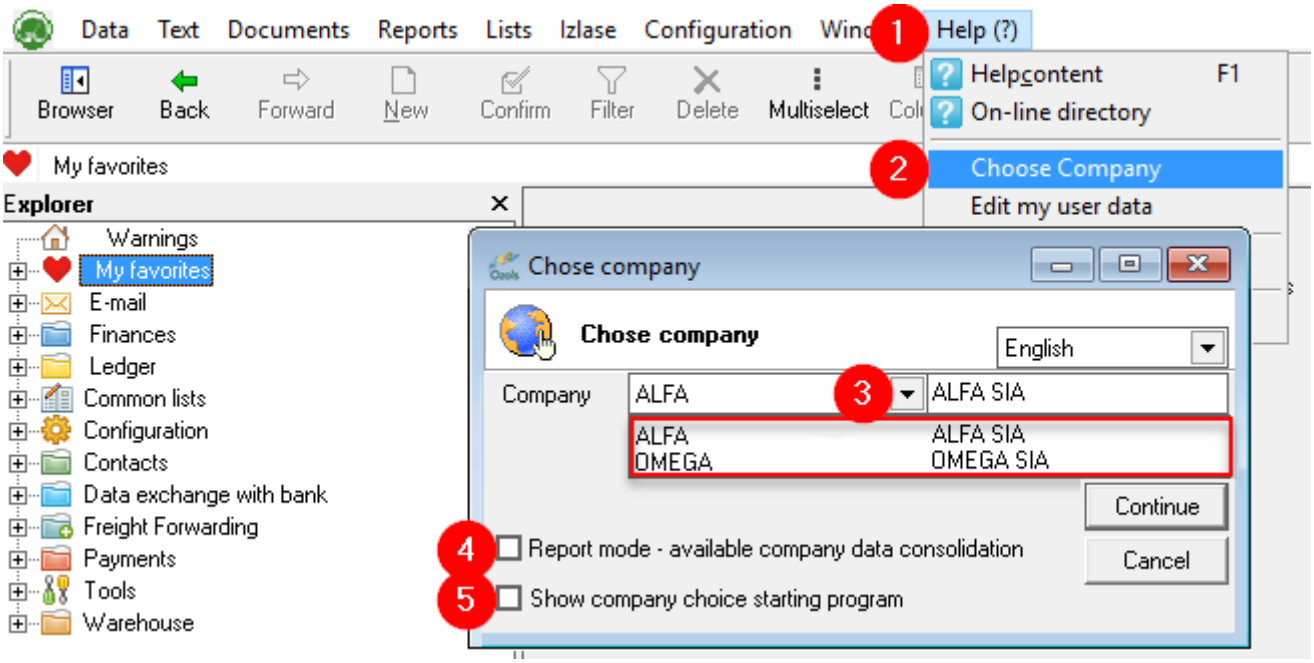
Work with several companies

> How to work if you have access to several company data bases?

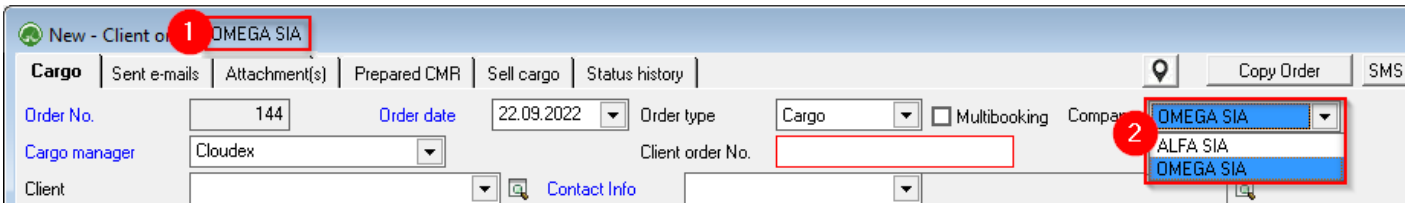
1. Switching between companies
2. Choose the company in the New Customer's order
3. Set the default company for the cooperation Partner
4. Access shortcut to database of the other company
5. How to change the company for a created order?
6. How to change company for incoming invoice?
7. Working with separate databases of several companies

1. Switching between companies

1. Help
2. Choose company
3. Select desired company
4. If you check ☑ the Consolidation, the data of all companies will be displayed together. If not, they will be separated!
5. If you check ☑ the option to choose the company will be given when opening OZOLS TMS



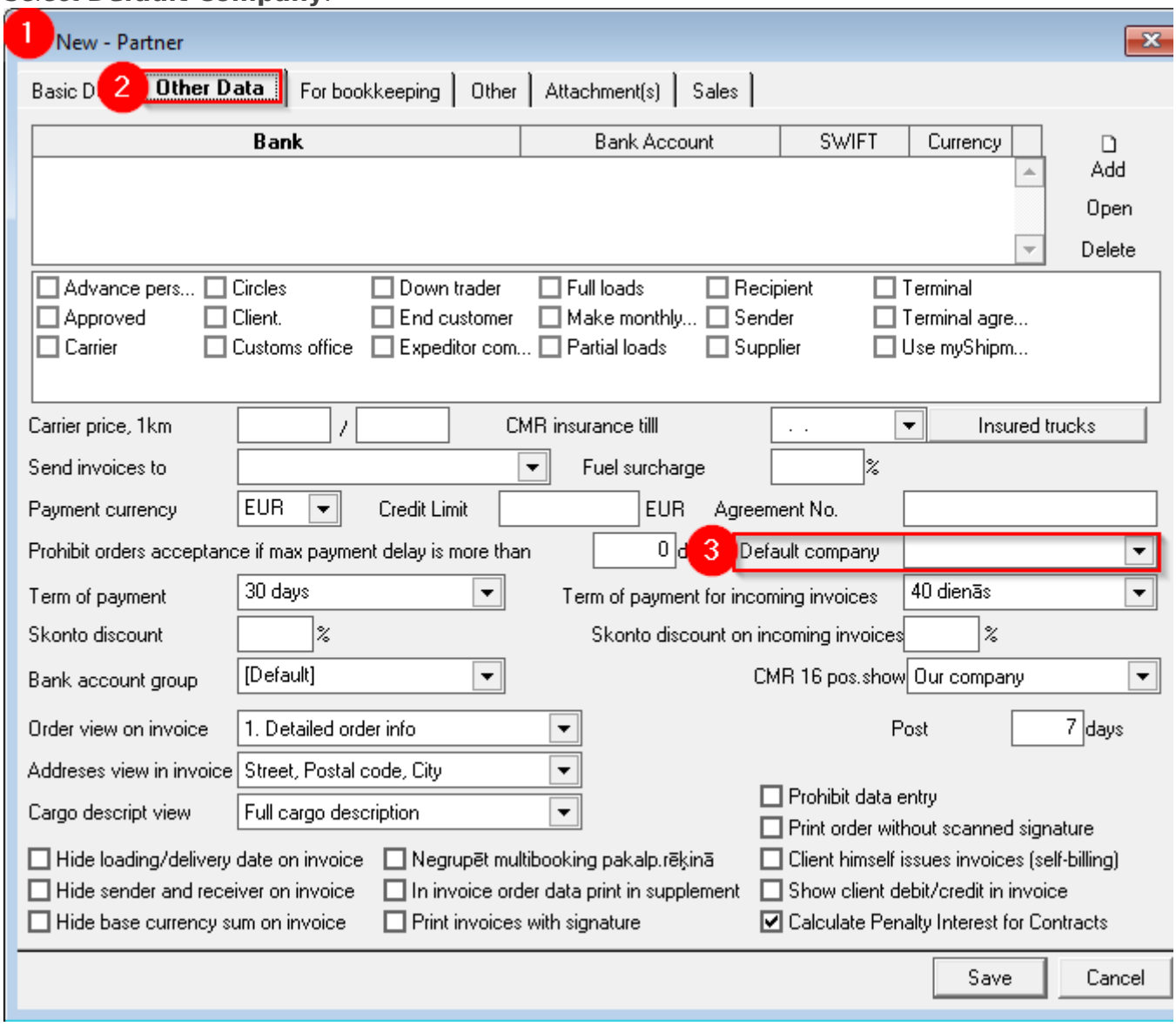
2. Choose the company in the New Customer's order



3. Set the default company for the cooperation Partner

> It is possible for you to determine which of your companies to use by default in cooperation with the specific Partner.

1. Open **the Partner card**;
2. Open the **Other data** section;
3. Select **Default Company**.



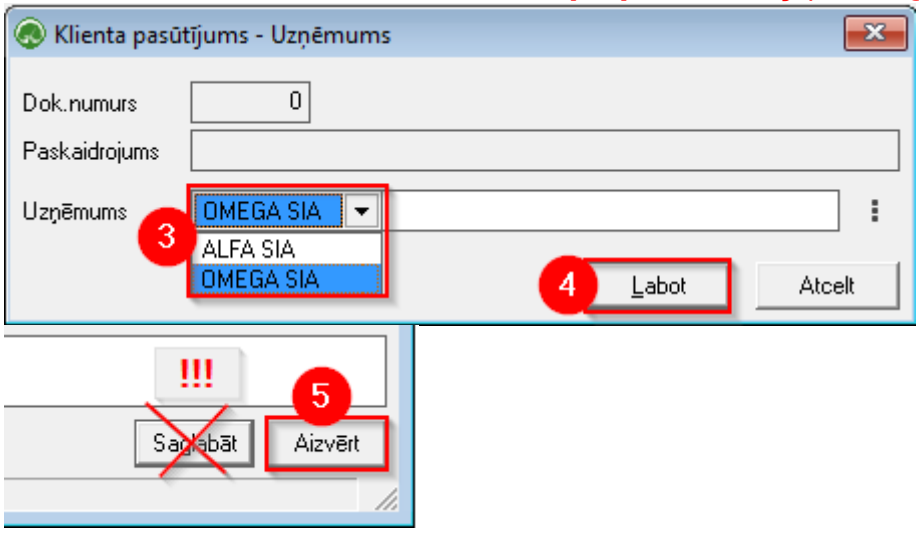
4. Access shortcut to database of the other company

If you have two or more companies with separate OZOLS TMS access , it is possible to create a shortcut to each of these companies. Instructions can be found here .

5. How to change the company for a created order?

> If you have several companies available and you have entered the Customer's order and/or Trip/Expedition **to the wrong company**

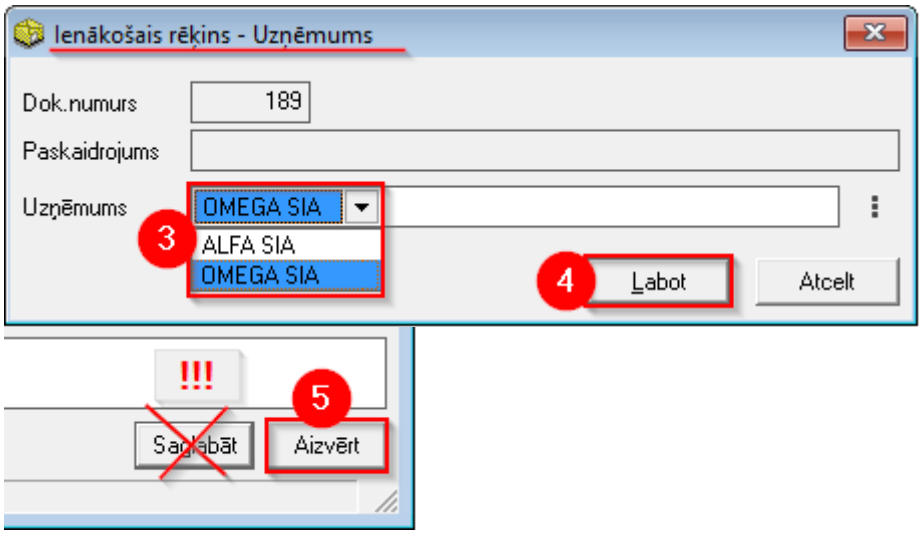
1. Open **the Customer's order or Trip/Spedition**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**
5. **!!!** Close **the Customer's order or Trip/Spedition by** pressing the **Cancel button !!!**



> If the Invoice is also already issued from the wrong company, it must be deleted and a new Invoice created after correcting the company (shift+F4).

6. How to change company for incoming invoice?

1. Open **the Customer's Incoming Invoice**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**
5. **!!!** Close **the Incoming invoice by** pressing the **Close button!!!**


Ienākošais rēķins - Uzņēmums
Dok.numurs
189
Paskaidrojums
Uzņēmums
OMEGA SIA
3
ALFA SIA
OMEGA SIA
4
Labot
Atcelt

!!!
5
Aizvērt

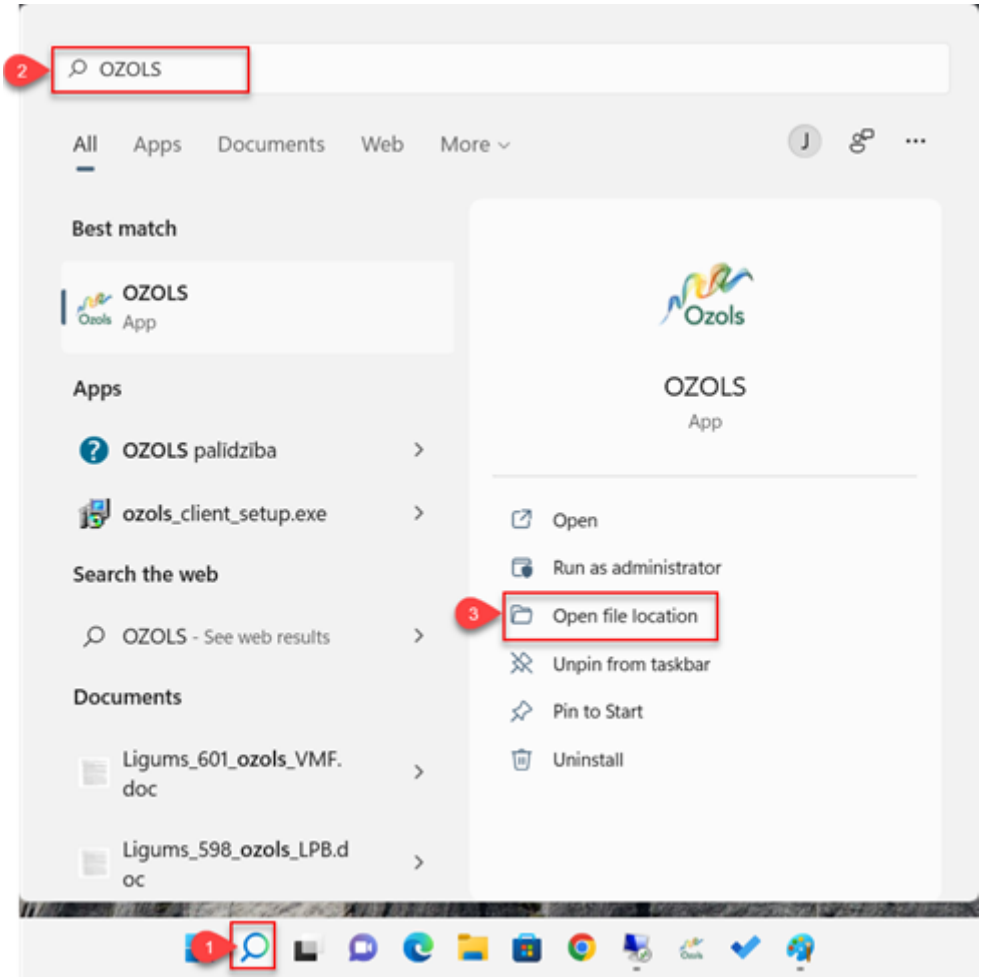
Access shortcut to another company's database OZOLS TMS

> If you have **two or more companies with separate access to OZOLS TMS** , it is possible to create a shortcut to each of these companies. **Benefits**:
> 1. You only need **to enter a password when** opening company database;
> 2. **Open and work with several companies at the same time.**

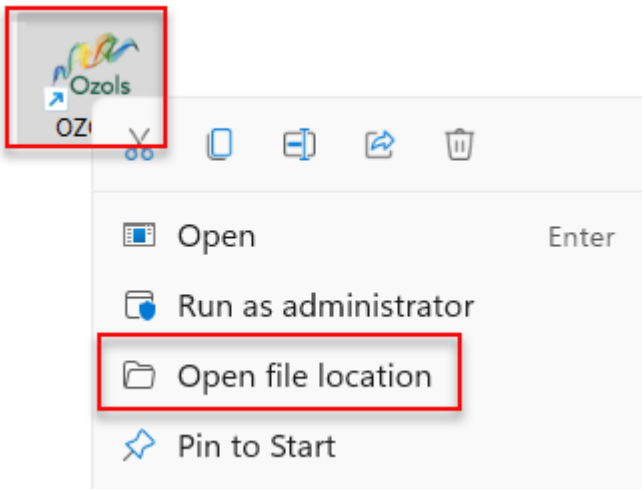
1) press search on the Windows desktop ;

2) OZOLS is written in the search field ;

3) Select **Open file location** ;



4) Select Open file location again until a folder opens where you can see a file called OZOLS.EXE

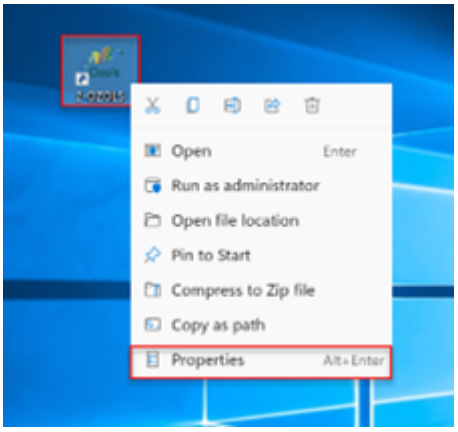


5) Create **a new Folder** with the name of the desired company.

6) **Copy** the OZOLS.EXE file and place the copy in the **newly created folder** .

7) Create a shortcut to the new OZOLS.EXE file on the desktop and **rename** it to fit the name of the desired company.

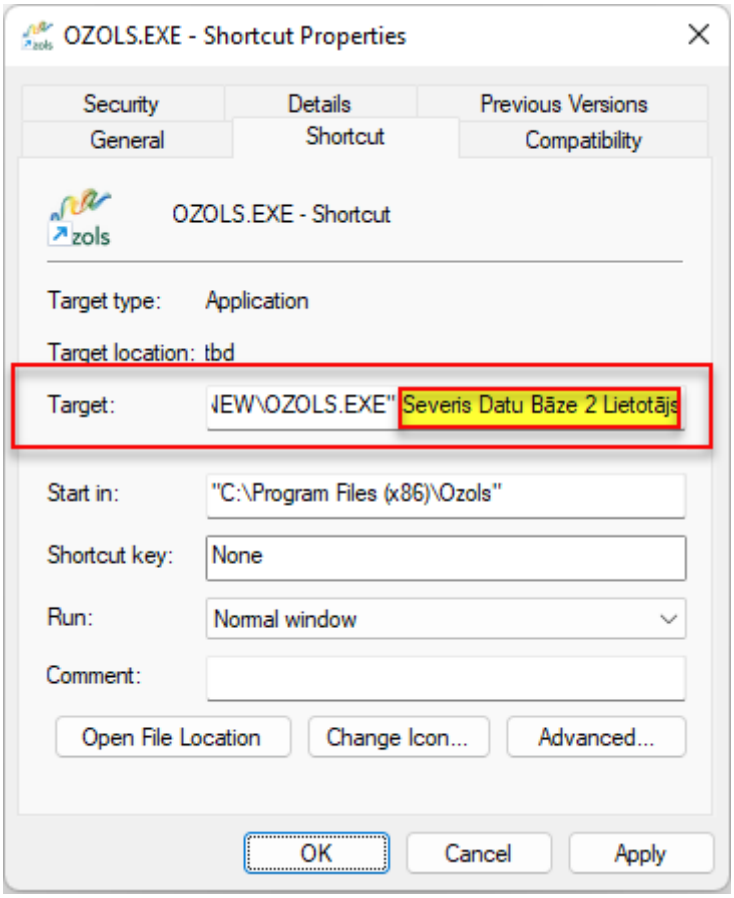
8) Open Functions with the right mouse button and select **Properties.**



9) In the **Target** field , add the already existing record with server, company database and user information:

1. **Server** – Name of the server on which the company OZOLS TMS database is located;
2. **Database** – the username assigned to the company in the Ozols database;
3. **2** - the number two, which must be entered before the user's name;
4. **User** – the username assigned to your Ozols user account.

> **There must be a space** between these entries !



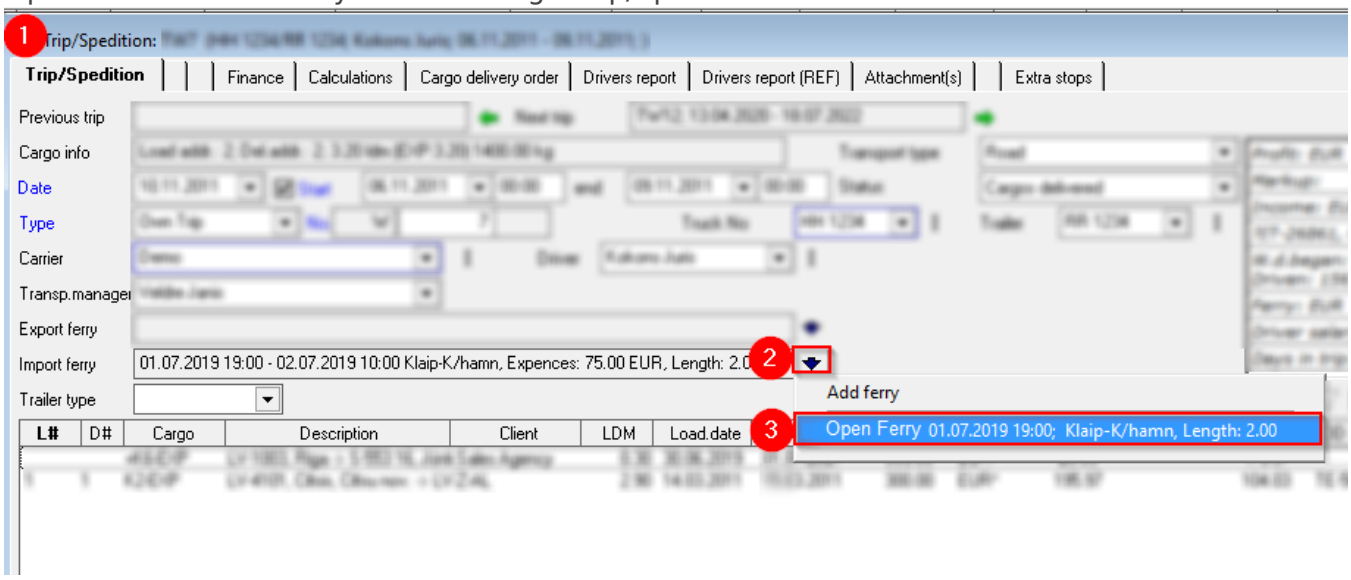
When the record has been updated, close the window by pressing **Apply** and **Ok** .

Congratulations ! You have created a separate access to the company account in OZOLS TMS!
Now you can simultaneously open all companies that are available to you in OZOLS TMS on your computer.

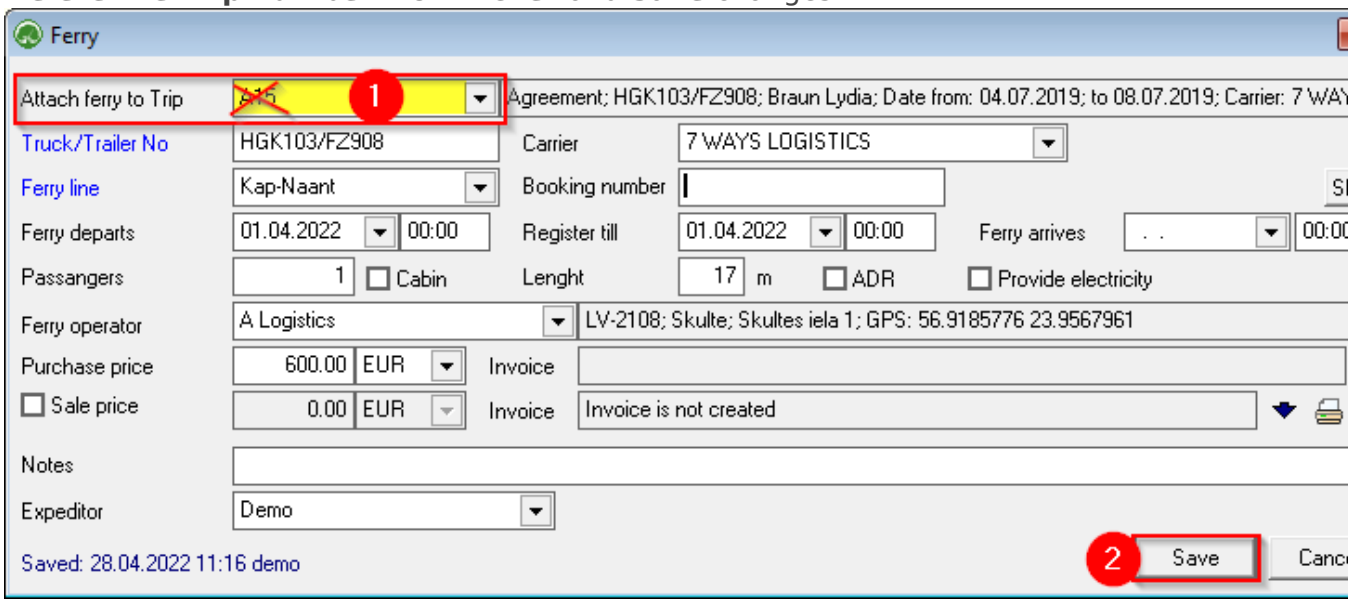
How to Delete ferry ticket

To delete an incorrectly created ferry ticket:

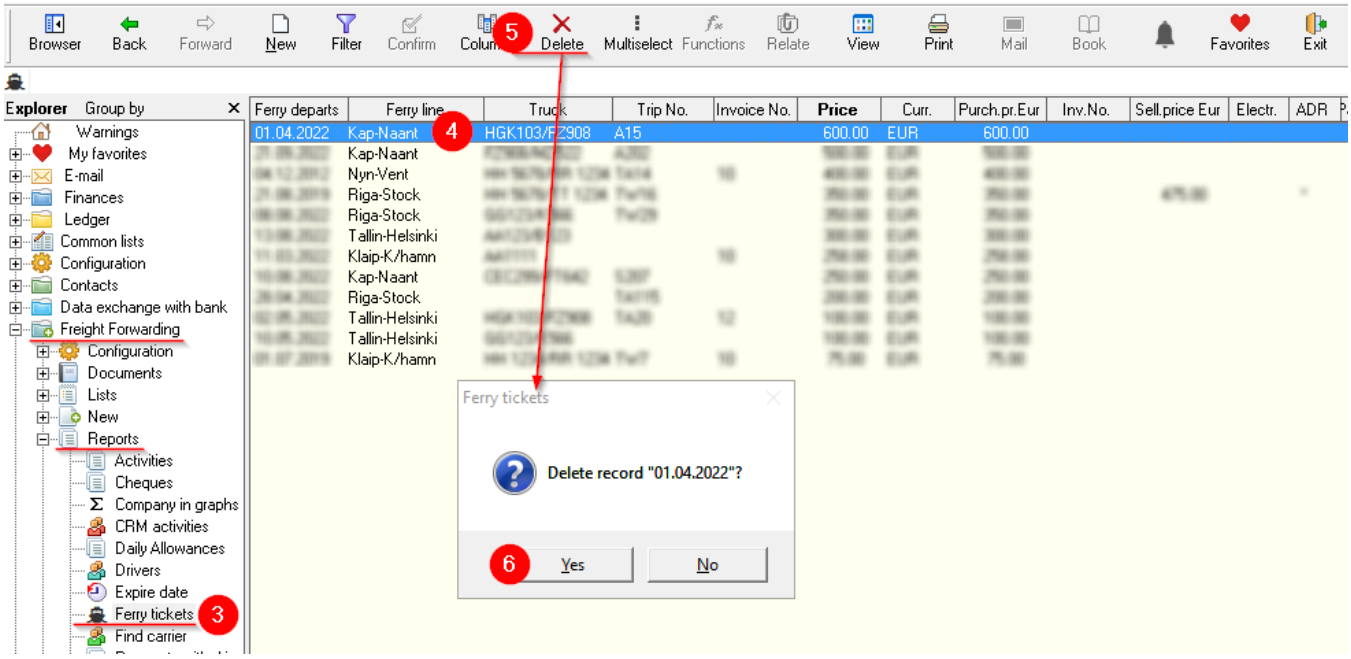
1. Open the incorrect Ferry Ticket through Trip/Spedition



2. **Delete the Trip number from ticket** and **Save** changes.



3. **OZOLS > cargo transportation > Reports > Ferry tickets**
4. **Find** the record you want, use the filter if necessary
5. Press **Delete** Delete
6. **Confirm** the deletion of the record


Browser
Back
Forward
New
Filter
Confirm
Delete
Multiselect
Functions
Relate
View
Print
Mail
Book
Favorites
Exit
5
Explorer
Group by
Warnings
My favorites
E-mail
Finances
Ledger
Common lists
Configuration
Contacts
Data exchange with bank
Freight Forwarding
Configuration
Documents
Lists
New
Reports
Activities
Cheques
Company in graphs
CRM activities
Daily Allowances
Drivers
Expire date
Ferry tickets
Find carrier
3
Ferry departs
Ferry line
Truck
Trip No.
Invoice No.
Price
Curr.
Purch.pr.Eur
Inv.No.
Sell.price Eur
Electr.
ADR
01.04.2022
Kap-Naant
HGK103/FZ908
A15
600.00
EUR
600.00
4
Kap-Naant
Nyn-Vent
Riga-Stock
Riga-Stock
Tallin-Helsinki
Klaip-K./hamn
Kap-Naant
Riga-Stock
Tallin-Helsinki
Tallin-Helsinki
Klaip-K./hamn
Ferry tickets
Delete record "01.04.2022"?
6
Yes
No