

# Purchase Orders Schedule & Shipment Schedule

In the carrier portal, to add and schedule purchase orders for pickups and deliveries using the **Purchase Orders Schedule** tool, or **Shipment Schedule** tool, follow along with this video or the steps below. Purchase Orders Schedule is where carriers can add their customer's purchase orders, then schedule dock appointments for pickups and deliveries.

To schedule a pickup or delivery for a specific PO, go to the **Purchase Orders Schedule** page in the carrier portal.

*If applicable*, select the **Appointment Type**: Delivery or Pickup (1).

If not applicable, just put the PO number in the **Search PO** field (2), and click **+Add PO** (3).

The screenshot shows a web form titled "Get Available Date and Time". At the top right, there is a dropdown menu for "Appointment Type:" with options "Delivery" (selected and marked with a red box and number 1), "Delivery", and "Pickup". Below this, on the left, is a "Search PO" field containing "1234TEST" (marked with a red box and number 2) and a green "+ Add PO" button (marked with a red box and number 3). Other fields include "Carrier or Broker" (with "Carrier/Broker" entered), "Preferred Date (optional)" (with "mm/dd/yyyy" and a calendar icon), "Total Weight" (0), "Total Skids" (0), "Carrier PRO" (Carrier PRO), and "Trailer #" (Trailer #). At the bottom, there is a section labeled "PO Summary Details".

If you are picking up or delivering multiple POs at the same time, repeat the process until all of the POs are showing in the **PO Summary Details**.

Next, enter the name of the carrier that will be picking up the freight in the **Carrier or Broker** field.

To select an alternative date, other than Original Requested Arrival Date, enter it in the **Preferred Date** field. This will allow you to view time slots on the requested date.

We recommend that you do not change the Total Skids or Total Weight here. If any of this information needs to be changed, please contact the customer directly.

The Carrier PRO and Trailer # can be entered, but they are optional. Once all of

information has been entered, click **Get Times** in the top right corner.

The screenshot shows a form titled "Get Available Date and Time" with a blue header bar. On the right of the header, it says "Appointment Type: Delivery" with a dropdown arrow, and a green "Get Times" button. The form body has a light gray background and contains several input fields: "Search PO" with an information icon and a "+ Add PO" button; "Carrier or Broker" with a "Test Carrier" input; "Preferred Date (optional)" with a "mm/dd/yyyy" input and a calendar icon; "Total Weight" with a "777" input; "Total Skids" with a "0" input; "Carrier PRO" with a "Carrier PRO" input; and "Trailer #" with a "Trailer #" input.

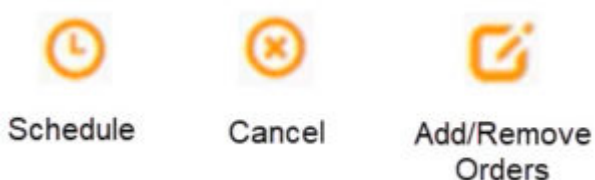
A list of **Available Times** will appear in the dropdown at the bottom of the page. Select your preferred time and click **Schedule**.

The screenshot shows a form titled "Your Shipment/Orders" with a blue header bar. On the right of the header, there are "Cancel" and "Schedule" buttons. The form body has a light gray background and contains several input fields: "Carrier/Broker" with a "Test Carrier" input; "Trailer #" with a "Test" input; "Warehouse" with a "Test" input; "Partition" with a "Test" input; "Delivery Method" with a "Live Unload" input; "Duration in Minutes" with a "60" input; "Delivery Date" with a "Dec 28, 2020" input; "Available Dates" with a "12/28/2020" input and a dropdown arrow; and "Available Times" with a dropdown menu open showing three options: "12/28/2020 4:00 PM", "12/28/2020 4:00 PM", and "12/28/2020 5:00 PM". A red arrow points from the "Schedule" button to the "Available Times" dropdown.

A Special Request is triggered when there are no available appointment slots to accommodate a trailer at a warehouse on a given date. You must fill out the fields in the special request window, including the Requested Date, Requested Time, and Request Reason. Once the required information has been added, click Submit Request.

The request will be sent to the customer and they will either approve or deny it based on their availability.

## Shipment Schedule



### 1. Schedule

The Shipment Schedule page contains the shipments that are booked but have not been scheduled for pickup or delivery. You can **schedule the shipment** by clicking the **Clock** icon to get available times. As in the PO Schedule window, a list of **Available Times** will appear in the dropdown at the bottom of the page. Select your preferred time and click **Schedule**.

**Your Shipment/Orders**

Carrier/Broker	Test Trucking	Delivery Method	Live Unload
Trailer #		Duration in Minutes	60
Warehouse	Test	Delivery Date	Dec 28, 2020
Partition	Test	Available Dates	12/28/2020
		Available Times	12/28/2020 4:00 PM

## 2. Cancel

To **cancel a shipment**, click the **Cancel** icon next to the shipment. Select the reason for cancellation in the popup window and Confirm Cancellation.

Get Available Date and Time Appointment Type: Delivery

Existing Shipments/Manifests Available to Schedule

Search

Action	Company	Shipment(s)	Delivery Date	Orders	Carrier	Mode	Payment Type	Weight	Units	Skids
	KBX-0701127-20	01/04/2021	PU989845123	Test Trucking	LTL	Outbound Collect	1500	100	1	

Cancel Shipment

## 3. Add/Remove Purchase Orders

To **add a purchase order** to a shipment, click on the **Add/Remove Orders** icon under Actions. In the popup, search for the PO you would like to add and click **+Add PO**. Then, click the **+** next to the PO you are adding. Finally, click **Confirm Edit** to finalize adding the PO.

To **remove a purchase order** from a shipment, click on the **Add/Remove Orders**

icon under Actions. In the popup, click the Remove Order icon (x) next to PO you want to remove and **Confirm Edit**.

Add Remove Purchase Orders

Search PO

Search PO

+ Add PO

PO Summary Details

Search

Search

Action	Order	Company	City	State	Line Items	Weight	Quantity	Units	Original Requested Arrival Date	Requested Arrival Date
	5678TEST	test compna	Acton	MA	1.0	777.0	0.0	1.0		2020-01-03
	PU989845123	TEst Co LLC	Milford	MA	1.0	1500.0	10.0	100.0	January 4, 2021	January 4, 2021

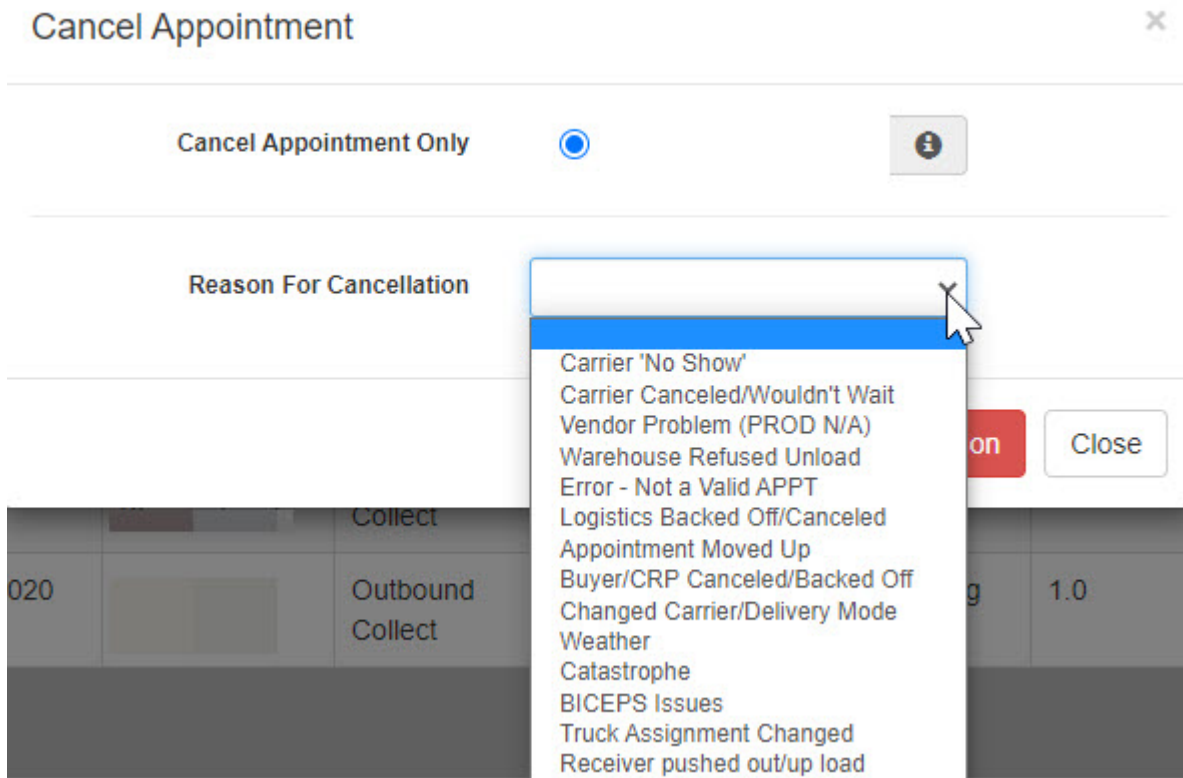
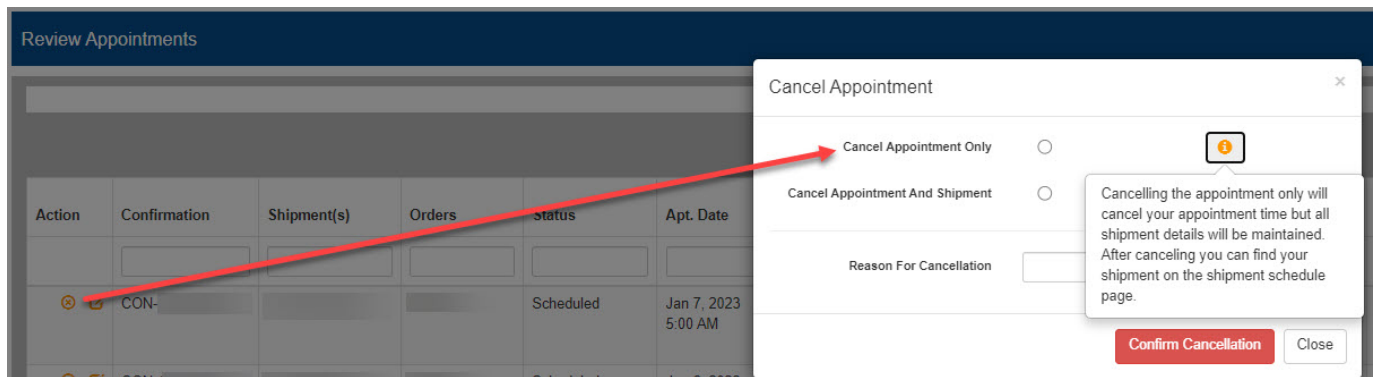
Confirm Edit

Close

## Review Pending and History

All booked and scheduled shipments will move to the **Review Pending and History** page. On this page, you can monitor upcoming appointments, add POs, or cancel appointments. These can all done as they are in the Shipment Schedule screen, as described above.

To cancel an appointment, click the **Cancel Shipment** icon (x). This will allow you to schedule a new pickup later without completely cancelling the shipment. In the popup, select a reason for cancellation, and **Confirm Cancellation**.





Cancelling your appointment will only cancel your appointment time but all shipment details will be maintained. After cancelling, you can find your shipment back on the Shipment Schedule page.

To adjust the pickup date after a shipment has been scheduled, cancel the current appointment using the above instructions, and then adjust the pickup date on the Shipment Schedule page.

Get Available Date and Time for:

Existing Shipments/

Action	Company	Shipment(s)	Pickup Date	Delivery Date	Orders	Client Orders
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
🕒 ⚙️ ✎️	<input type="text"/>	KBX-0167262-23	<div> <input type="text"/>   </div>	11/13/2023	<input type="text"/>	<input type="text"/>



- 11/21/2023
- 11/22/2023
- 11/23/2023
- 11/24/2023
- 11/25/2023
- 11/26/2023
- 11/27/2023
- 11/28/2023
- 11/29/2023
- 11/30/2023
- 12/01/2023
- 12/02/2023
- 12/03/2023
- 12/04/2023
- 12/05/2023
- 12/06/2023
- 12/07/2023
- 12/08/2023
- 12/09/2023