

# 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 1", "Delivery", and "Pickup". Below this, on the left side, is a "Search PO" field containing "1234TEST" with a red box around it and a "+ Add PO" button with a red box around it. Below the search field are fields for "Carrier or Broker" and "Preferred Date (optional)". On the right side, there are input fields for "Total Weight", "Total Skids", "Carrier PRO", and "Trailer #". At the bottom right, there is a "Get Times" button. At the bottom center, there is a link for "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.

Get Available Date and Time Appointment Type: Delivery

Search PO <input type="text" value="Search PO"/> <input type="button" value="+ Add PO"/>	Total Weight <input type="text" value="777"/>
Carrier or Broker <input type="text" value="Test Carrier"/>	Total Skids <input type="text" value="0"/>
Preferred Date (optional) <input type="text" value="mm/dd/yyyy"/>	Carrier PRO <input type="text" value="Carrier PRO"/>
	Trailer # <input type="text" value="Trailer #"/>

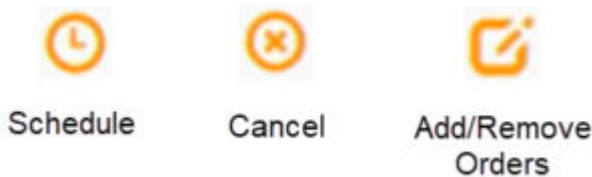
A list of **Available Times** will appear in the dropdown at the bottom of the page. Select your preferred time and click **Schedule**.

Your Shipment/Orders

Carrier/Broker <input type="text" value="Test Carrier"/>	Delivery Method <input type="text" value="Live Unload"/>
Trailer # <input type="text" value=""/>	Duration in Minutes <input type="text" value="60"/>
Warehouse <input type="text" value="Test"/>	Delivery Date <input type="text" value="Dec 28, 2020"/>
Partition <input type="text" value="Test"/>	Available Dates <input type="text" value="12/28/2020"/>
	Available Times <input type="text" value="12/28/2020 4:00 PM"/> <input type="text" value="12/28/2020 4:00 PM"/> <input type="text" value="12/28/2020 5:00 PM"/>

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**.

The screenshot shows a shipment management interface. At the top, there is a table with shipment details. Below it, a 'Your Shipment/Orders' panel is displayed. The panel contains fields for Carrier/Broker, Trailer #, Warehouse, Partition, Delivery Method, Duration in Minutes, Delivery Date, Available Dates, and Available Times. A red box highlights the 'Available Times' dropdown menu, which is currently set to '12/28/2020 4:00 PM'. Another red box highlights the 'Schedule' button in the top right corner of the panel.

## 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.

The screenshot shows a 'Get Available Date and Time' popup window. The window has a search bar and a table of existing shipments/manifests available to schedule. The table has columns for Action, Company, Shipment(s), Delivery Date, Orders, Carrier, Mode, Payment Type, Weight, Units, and Skids. A red arrow points to the 'Cancel Shipment' button in the 'Action' column of the table.

## 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**.

Search PO

PO Summary Details

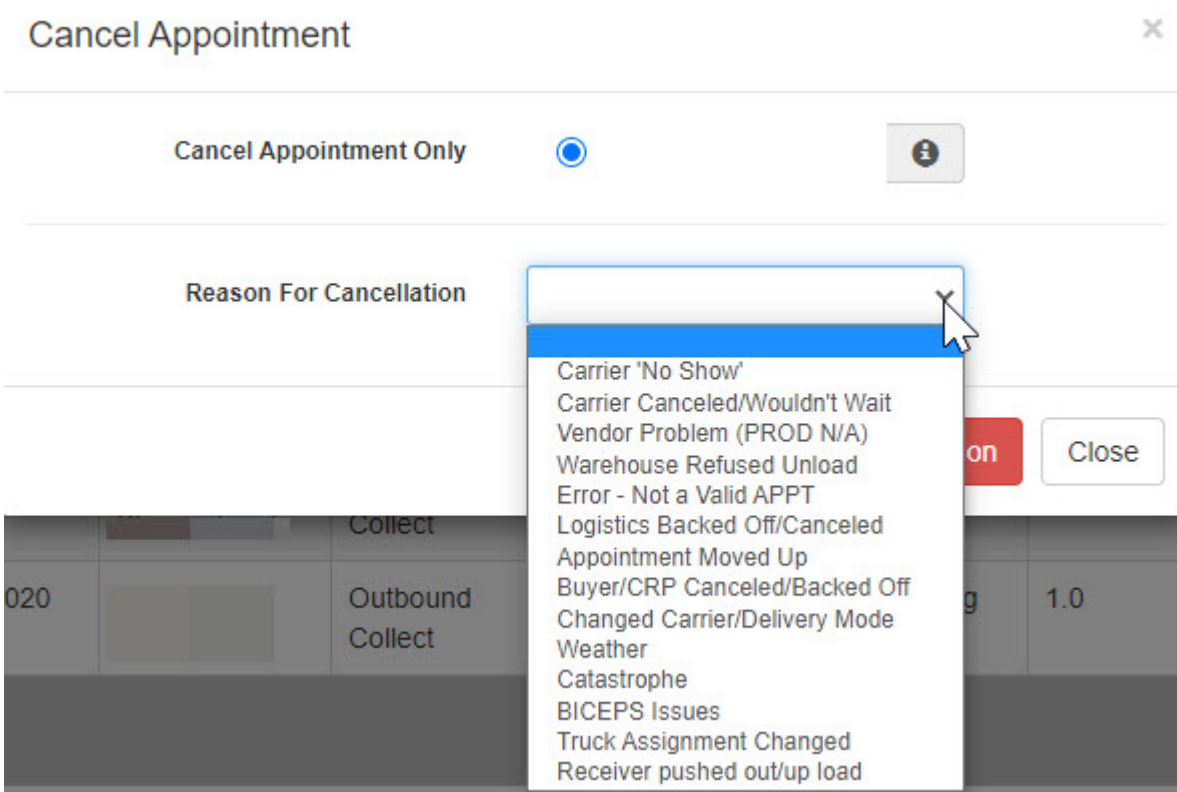
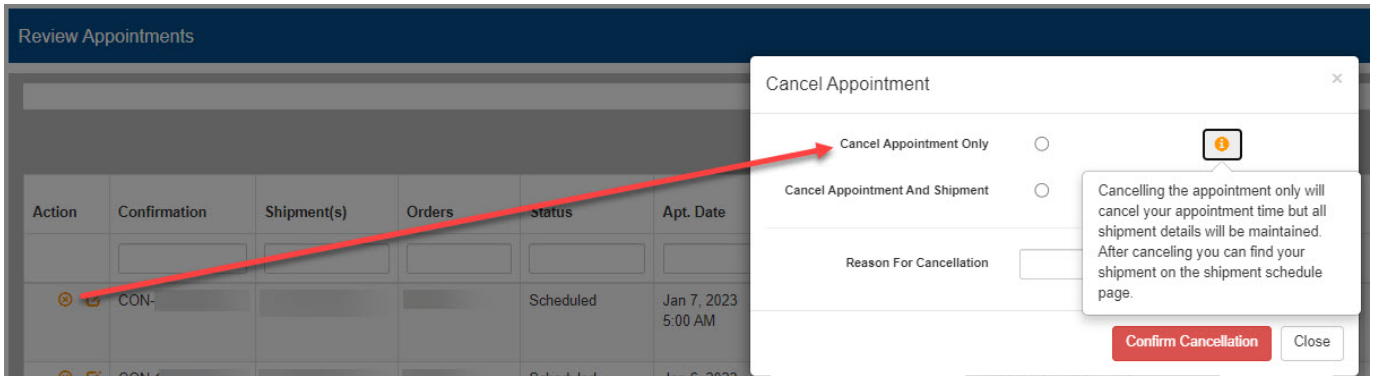
Search

Action	Order	Company	City	State	Line Items	Weight	Quantity	Units	Original Requested Arrival Date	Requested Arrival Date
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
⊗	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

## 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"/>
🕒 ⓧ ✍️		KBX-0167262-23	<input type="text"/> <div style="border: 1px solid #ccc; padding: 2px;"> <span>▼</span> <span style="float: right;">✔️</span> </div>	11/13/2023		

- 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