

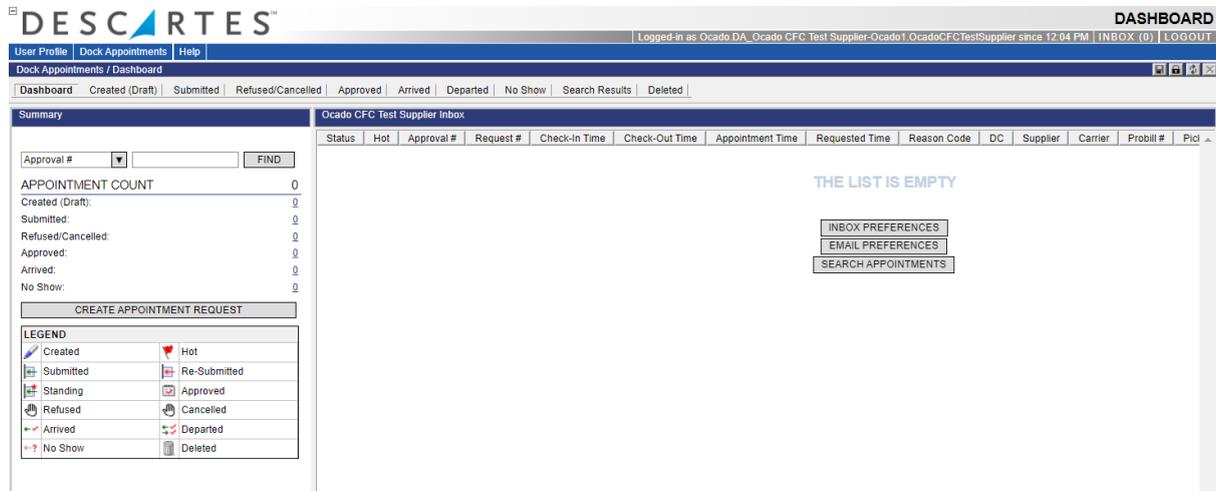
# Descartes Dock Appointment Scheduling Supplier and Haulier User Manual

June 2022

# Contents

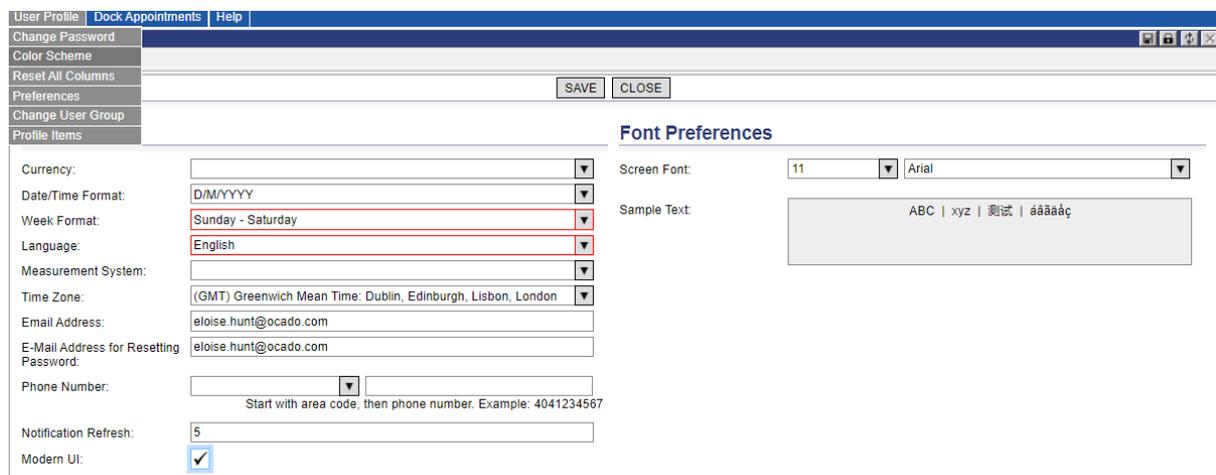
<b>Logging Into Descartes Dock Appointment Scheduling Portal</b>	<b>3</b>
Setting Email Preferences	4
<b>Carrier and Supplier Tasks</b>	<b>6</b>
Creating an Appointment Request	7
Updating an Appointment Request	11
Updating Approved Appointment Requests	12
Cancelling an Appointment Request	13
Managing Users as a Party User Admin	13
Adding a User	13
Editing a User	13
Removing a User	14
Carrier Self-Registration Process	14
<b>Key Terms</b>	<b>15</b>

# Logging Into Descartes Dock Appointment Scheduling Portal



## 1. Under **User Profile > Preferences** set:

- **Date/Time Format** to UK date format **D/M/YYYY**
- **Time Zone** to **(GMT)**
- Enter **Email Address for Resetting Password**
- Select the checkbox next to **Modern UI**.



## 2. Click **Save**.

## Setting Email Preferences

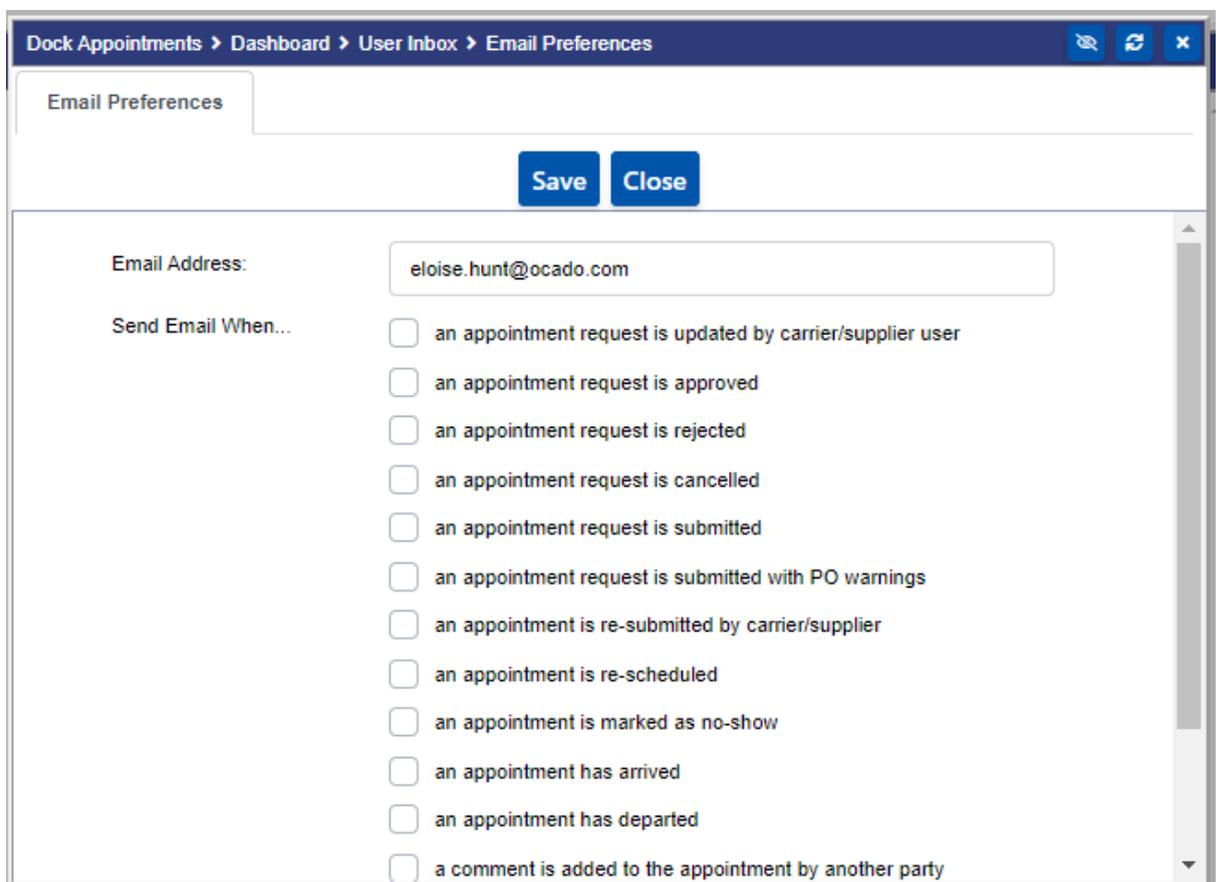
Email Preferences determine what emails are sent to each user when an action occurs to an appointment; each user can redefine what they want to receive. For instance, if the email preference Send an email when... an appointment request is approved checkbox is selected, then when an appointment is approved, the user will receive an email notifying them that it has been approved.

Not every update will trigger a notification email, even when specified. To allow for multiple edits and to avoid numerous emails when updates occur in rapid succession, notifications under these circumstances are compiled and sent within a given time frame.

To set your email preferences:

1. From the main menu, select **Dock Appointments > Email Preferences**, or in the Inbox pane, right-click and select **Email Preferences** from the right-click menu.

The **Email Preferences** window displays.



The screenshot shows the 'Email Preferences' window. The breadcrumb navigation at the top reads 'Dock Appointments > Dashboard > User Inbox > Email Preferences'. Below the breadcrumb is a tab labeled 'Email Preferences'. At the top center of the window are two buttons: 'Save' and 'Close'. The main content area contains an 'Email Address:' label followed by a text input field containing 'eloise.hunt@ocado.com'. Below this is a 'Send Email When...' label followed by a list of 13 checkboxes, each with a corresponding event description:

- an appointment request is updated by carrier/supplier user
- an appointment request is approved
- an appointment request is rejected
- an appointment request is cancelled
- an appointment request is submitted
- an appointment request is submitted with PO warnings
- an appointment is re-submitted by carrier/supplier
- an appointment is re-scheduled
- an appointment is marked as no-show
- an appointment has arrived
- an appointment has departed
- a comment is added to the appointment by another party

2. In the Email Address field, enter the email address you want notifications sent to when the action occurs.
3. Select the email preferences you desire from the **Send Email When** checkboxes. An email will then be sent to the email address specified above when the action occurs. For example, if you select **an appointment request is rejected**, then when an appointment request is rejected, you will be notified by email.
4. Click **Save**.

## Carrier and Supplier Tasks

Carriers have access to appointment requests that identify the respective carrier in the request header. They can perform the following tasks:

- Create appointment requests with shipment information
- Create appointment requests against standing appointments
- Submit appointment requests to Coordinators for approval
- View appointment progress without access to door assignment and additional order information
- Add comments when necessary throughout the appointment process
- Cancel appointment requests
- Request a different appointment date and time
- Update appointment with add-on items
- View carrier details and add more carrier terminals
- Print and/or email appointment details

Suppliers have access to appointment requests that identify the respective supplier in the request header. They can do the following tasks:

- Create appointment requests with shipment information
- Create appointment requests against standing appointments
- Submit appointment requests to Coordinators for approval
- View appointment progress without access to door assignment and additional order information
- Add comments when necessary throughout the appointment process
- Cancel appointment requests
- Request a different appointment date and time
- Update appointment with add-on items
- Print and/or email appointment details

# Creating an Appointment Request

To create an appointment request, from the main menu, select **Dock Appointments > Create Appointment Request**, or click the **Create Appointment Request** button on the dashboard. The Create Appointment Request page is displayed.

The screenshot shows the 'Create Appointment Request' interface. At the top, there are 'Save Draft', 'Submit', and 'Cancel' buttons. The form is divided into several sections:

- Appointment Type:** Radio buttons for 'Use standing appointment', 'Regular appointment' (selected), and 'Use standing appointment. If unavailable use Regular'. A 'Track as hot appointment' checkbox is also present.
- Carrier:** A dropdown menu.
- Requested Date:** A date picker.
- Appointment Date:** A date input field.
- Dock Number:** An input field.
- Supplier:** A dropdown menu with a 'Multiple suppliers' checkbox.
- Unload Method:** A dropdown menu.
- Trailer Regn. #:** An input field with a 'Driver: Select Driver...' dropdown.
- Ship To:** A dropdown menu.
- Appointment Totals:** A table with columns: Commodity, UOM, Qty, Overrides, Lines. Below it are 'New' and 'Delete' buttons.
- Comments:** A table with columns: Comment, Saved By. Below it are 'New' and 'Delete' buttons.
- Private:** A checkbox.
- Comments time is in DC local time zone (unless noted otherwise)**
- Footer:** A status bar with 'New', 'Delete', and 'Multiple PO Entry' buttons.

1. To use a standing appointment request, select **Use Standing Appointment**.
2. Select a Carrier from the Carrier dropdown
3. Select a supplier from the Supplier dropdown. Select the Multiple Suppliers checkbox to enable the Supplier dropdown field on the purchase order form, where suppliers can be selected per line item. The Supplier dropdown is prepopulated with selections based on the carrier selected.
4. From the Ship To dropdown, select a distribution centre. The Ship To menu is populated based on the selected carrier and supplier.
5. Enter the Trailer Regn. #.
6. From the Unload Method dropdown, select from the following options:
  - a. **Single Stacked:** Delivery consists of a single layer of pallets / dollies / bread trays / cages.
  - b. **Double Stacked:** Delivery consists of pallets which are double stacked (ambient only)
  - c. **Double Deck:** Delivery is to be made on a double decker LGV.

7. Enter a purchase order manually or select a purchase order from the PO # dropdown. All related fields populate automatically based on the selection.

If the PO is entered manually, validation is performed as follows:

- When users add a PO to an appointment request, the system compares the PO's destination DC to the DC selected in the appointment request.
- If the destinations match, validation is completed and the PO is added.
- If the PO# is not found in the system, three exclamation marks are shown to the left of the PO#.

8. Click New to add additional PO#'s.

Or,

A. Click **Multiple PO Entry**. The **Multiple PO Entry** page displays.

Multiple PO Entry

Candidate POs

Codes

VALIDATION CODES	
*	GOOD: PO # is valid
**	NOTE: Multiple ASNs for current Ship To
!!!	WARNING: PO # not found in system
+++	WARNING: Supplier does not exist
SSS	WARNING: Supplier not serviced by carrier
###	WARNING: No ASN # for current Ship To
///	WARNING: ASN # booked previously
AAA	WARNING: Duplicate PO# on booking
%	Quantity is over the remaining PO units

CLEAR CANDIDATE PO BOX

VALIDATE

SAVE

CLEAR ALL

!	Hot	PO #	SKU #	H/U #	Supplier #	Supplier Name	Commodity	Qty	UOM	Order Type	Item Description	EQ Order Type	Ad Date

Input Element:  Result:

PO #:

SKU #:  Handling Unit #:

Supplier Name:   Hot Item Item Description:

Supplier Case Barcode:  Customer:

SSCC Qty:    Ad Date:

Commodity                      Quantity                      UOM

Comments:

Rejected
-Early Tolerance
First Receipt
Last Receipt
+Late Tolerance
Rejected

Delete

- B. Type or cut and paste each desired PO number on a new line or in a comma-delimited list in the Candidate POs text box and click **Validate**. To remove all entries from the text box, click **Clear**.

The system reviews the entries and lists them in the PO form under the Candidate POs text box, complete with any available information and a validation code, which can be interpreted by referencing the Validation Codes legend.

VALIDATION CODES	
*	GOOD: PO # is valid
**	NOTE: Multiple ASNs for current Ship To
!!!	WARNING: PO # not found in system
+++	WARNING: Supplier does not exist
\$\$\$	WARNING: Supplier not serviced by carrier
###	WARNING: No ASN # for current Ship To
///	WARNING: ASN # booked previously
^^^	WARNING: Duplicate PO# on booking
%	Quantity is over the remaining PO units

- C. Click on an entry in the PO table to enter any further details in the provided fields. Click **Delete** to remove the selected PO from the form.
- D. When all desired POs have been entered, validated and entered, click **Save** to save the information and return to the **Appointment Details** or **Create Appointment Request** page. Click the **Clear All** button to remove all POs from the **Multiple PO Entry** page.

Once the POs are inputted, the system calculates PO date tolerances per DC or supplier via set PO tolerances and graphically indicates whether or not the orders fall within the specified tolerance levels.

7. Once the PO lines have been entered, set the Requested Date.

8. The Appointment Totals list will be populated with the number of pallets our ordering system has calculated the total appointment will consist of.

**Appointment Totals**

Commodity	UOM	Qty	Override	Lines

The following options are available:

- **Commodity:**
  - Dual Temperature - Deliveries being made on chill vehicles where a thermal barrier has been deployed to allow for part of the trailer to contain ambient goods
  - Chilled - Entire delivery is chilled goods
  - Frozen - Entire delivery is frozen goods
  - Ambient - Entire delivery is Ambient goods
  - Bread - Entire delivery is Bread goods
- **UOM:**
  - Pallet - *CHEP, LPP, IPR*
  - Cage - *Chilled Goods Only*
  - Bread Trays
  - Dollies - *Frozen Goods Only*
- **Qty:** Number of assets being delivered i.e. pallets / cages / dollies / bread trays
- **Override:** If the quantity prepopulated for the commodity and UOM being delivered on the appointment, then the override text box should be used to enter the new quantity.

If the pre populated commodity and UOM are correct but the Qty is incorrect, select **New** and select the **Commodity** and **UOM** from the dropdowns and enter the new quantity in the **Override** textbox. To save the new line select **New**.

If the pre populated **UOM** or **Commodity** is incorrect, select **New** and enter the correct details in a new line. To save the new line select **New**. Select the **Delete** button to remove any incorrect lines.

**Dual Temperature Vehicles:** Deliveries being made on chill vehicles where a thermal barrier has been deployed to allow for part of the trailer to contain ambient goods must override the original Appointment Total and select **Dual Temperature** from the **Commodity** dropdown dox. Then enter the asset type stock is being delivered on from the **UOM** dropdown list and the total number of pallets/cages/dollies being delivered. If you are delivering multiple assets on one appointment, please separate each on a new line.

To save the new line select **New**. Select the **Delete** button to remove any incorrect lines.

9. If you are requesting a delivery date and time different from the book time given, please enter the reason for this in the **Comment** box, displayed on the right-hand vertical pane of the page. Click **New** to detail additional separate comments and, to remove comments in the table, select the comment you wish to remove and click **Delete**. If the comments are private, select the **Private** check box - these will only be visible to the user creating the appointment.
10. Select one of the following:
  - **Save Draft:** saves a draft of the appointment request
  - **Submit:** submits the appointment request for approval
  - **Cancel:** cancels the appointment request

## Updating an Appointment Request

**Note**— An appointment can be updated up until it is checked in.

To update an appointment:

1. From the selected page, right-click on the desired appointment and select **Appointment Details**. The **Appointment Details** page is displayed.
2. Edit the appropriate fields.

**Note**— Carriers and Suppliers can update the Supplier, PO #, Pro #, Supplier Name, Quantity and Comments fields. If the PO# or the Requested Date/Time field is updated, the **Update** button changes to **Re-Submit**.

3. Carriers and Suppliers can add a new PO to the appointment. The **Update** button changes to **Re-Submit** when a new PO is added.
4. Click **Update** or **Re-Submit** depending on what changes were made to the appointment.

When the appointment is re-submitted, it goes back to the **Submitted Appointments** page for approval again.

## Updating Approved Appointment Requests

No Re-Submit button is displayed for the carrier or supplier user when an approved appointment is open and is being modified. Instead of showing the Re-Submit button, carrier and supplier users can click **Update** and the system will check for "critical" changes to the appointment. If the system detects that some critical changes were made, then it will warn the user that the appointment cannot be updated and must be re-submitted.

To provide an overview, the system does the following when the carrier or supplier attempts to update an approved appointment:

- When the carrier or supplier user makes a non-critical change to an approved appointment and clicks **Update**, the system displays a confirmation dialog with the following warning message: "You are updating an appointment. These changes will not resubmit an appointment for DC to review. If you feel the DC needs this information, please notify them directly using phone/email address under ship to area". Click **OK** to proceed with the update.
- When the carrier or supplier user makes a critical change to an approved appointment and clicks **Update**, the system displays a confirmation dialog with a warning message stating that the appointment must be resubmitted. Click **OK** to proceed with resubmission. Click **Cancel** to continue editing the appointment.
- If the system detects that the appointment was updated by other users while the current user was working on the same appointment, a warning message is displayed upon update stating that the appointment cannot be saved and must be reloaded before any further changes are made. The user then must reload the appointment to retrieve the latest version from the server.

## Cancelling an Appointment Request

To cancel an appointment (Submitted, Approved, Arrived or No Show/Delivery Failure):

1. From the selected page, right-click on the desired appointment and select **Cancel Appointment**. The **Cancel** window is displayed.
2. In the Reason Code field, select a reason for the cancellation.
3. In the Comment field, enter any comments.
4. Click **Save** to cancel the appointment or click **Cancel** to return to the appointment page.

## Managing Users as a Party User Admin

The Primary Logistics Contact can add, edit or remove carrier or supplier users assigned to their party from the respective Carrier Details or Supplier Details page. The Primary Logistics Contact will be a Party User Admin in the Descartes Dock Appointment Scheduling Portal.

### Adding a User

Party User Admins can create new user for their party. To create a new user, click the New button to create a new row in the Carrier/Supplier Details table and select the Not in list... option. The Create User page will appear, allowing the Party User Admin to create a new user with login credentials.

Once the new user is created, be sure to save the carrier or supplier. Otherwise, the new user will be created but will not be added to the party and the Party User Admin will not have access to it. In this case, the Party User Admin must contact [inboundcompliance@ocado.com](mailto:inboundcompliance@ocado.com) to add the user to the party.

### Editing a User

To edit a user, select a user in the Carrier/Supplier Details table and click the Edit User button. The Edit User window will appear, allowing the Party User Admin to edit user information and login credentials.

## Removing a User

To remove a user from the carrier or supplier, select a user in the Carrier/Supplier Details table and click the Delete button. The carrier or supplier user will be removed from the table. Once the user is removed, be sure to save the carrier or supplier.

## Carrier Self-Registration Process

The carrier can log in to the system with the credentials provided by the Ocado Inbound Compliance Team. Upon login, the Carrier Self Registration page appears, which must be completed before the new user is granted access to relevant areas of the application.

The Carrier Name, SCAC and Contact fields are required. The user can enter any comments to the administrators in the Your Comment text box. Click **Register** when all necessary information is entered.

**Note**— The Street Address, City/State/Zip, Country, Contact, Phone, Fax and Email Address fields are “optionally required”.

Once the self-registration is completed, the user is then given a set of roles appropriate for a Carrier user and the “Unregistered Carrier” role is removed from the user.

The Carrier user is then prompted to login again. Upon login, he or she will be able to submit appointment requests and access previously submitted appointments as with any other carrier user.

## Key Terms

<b>Approved</b>	A requested appointment is approved by the system
<b>Arrived</b>	A delivery has arrived at its destination CFC
<b>Candidate POs</b>	The box that copy and paste multiple PO-SKU numbers go into
<b>Carrier</b>	All references to a carrier in this user guide relate to your preferred haulier.
<b>Check-In</b>	A delivery has been recorded as arrived at its destination CFC
<b>Check-Out</b>	A delivery has been recorded as departed from its destination CFC
<b>Commodities - Ambient</b>	Delivery contains only ambient goods.
<b>Commodities - Bread</b>	Delivery contains only bread products on bread tray rollers.
<b>Commodities - Chilled</b>	Delivery contains only chilled goods.
<b>Commodities - Dual Temperature</b>	Delivery contains both chilled and ambient stock on a trailer where a thermal barrier has been deployed.
<b>Commodities - Frozen</b>	Delivery contains only frozen goods.
<b>Created (draft)</b>	An appointment that has been created but is not yet complete
<b>Dashboard</b>	The default tab in Descartes Appointment Management is 'Dashboard' – this is your Inbox and you can customise what appointments show here
<b>DC</b>	All references to a DC in this user guide relate to an Ocado CFC.
<b>EPoD: Electronic Proof of Delivery</b>	this is a report available in Descartes Appointment Management
<b>Minimum Service Duration</b>	Appointments are granted in multiples of this unit. The service duration is also rounded off to the next multiple of this unit. By default, this value is set to 15 minutes.

<b>Multiple PO Entry</b>	The option of copying and pasting multiple POs into an appointment for delivery
<b>PO</b>	The purchase order number
<b>PO Early tolerance</b>	Permissible duration of time an appointment can be booked before the scheduled appointment time dictated by Utopia without manual approval.
<b>PO Late Tolerance</b>	Permissible duration of time an appointment can be booked after the scheduled appointment time dictated by Utopia without manual approval.
<b>Received</b>	The total quantity of items that have been received in the destination CFC against the PO
<b>Requested Date</b>	The date the delivery is due to be delivered
<b>Service Duration Factors</b>	The amount of time given to an appointment based on the temperature regime, asset and type of vehicle (single or double deck).
<b>Shell Appointment</b>	A placeholder set up by the CFC team to specify the Supplier, time, days and regularity of a standing appointment
<b>Ship To</b>	The destination CFC for your delivery
<b>Standard Appointment</b>	Supplier/Haulier selects the time/date to book a delivery within the date tolerances
<b>Standing Appointment</b>	A predefined, regular delivery time at fixed intervals for a particular supplier; e.g. every Wednesday at 9 am
<b>Standing Appointments</b>	Standing appointments are appointments that are reservations for future appointments. They reserve a block of time for a vendor delivery. Later, a Carrier can ask to deliver using one of these reserved times. Standing appointments do not require detailed data elements and are simple and fast to create. Standing appointments can only be created by a Coordinator.
<b>Submitted</b>	A requested appointment has not yet approved
<b>Unload Method – Double Decker</b>	Delivery is to be made on a double deck LGV.

<b>Unload Method – Double Stacked</b>	Delivery is to be made on a single deck LGV with all pallets double stacked.
<b>Unload Method – Single Stacked</b>	Delivery is to be made on a single deck LGV with all pallets single stacked.
<b>UOM - Bread Tray</b>	The total number of stacks of bread trays to be delivered on the appointment
<b>UOM - Cage</b>	The total number of cages to be delivered on the appointment
<b>UOM - Dollies</b>	The total number of dollies to be delivered on the appointment (Frozen deliveries only)
<b>UOM - Pallets</b>	The total number of pallets to be delivered on the appointment