Freightdata 2000

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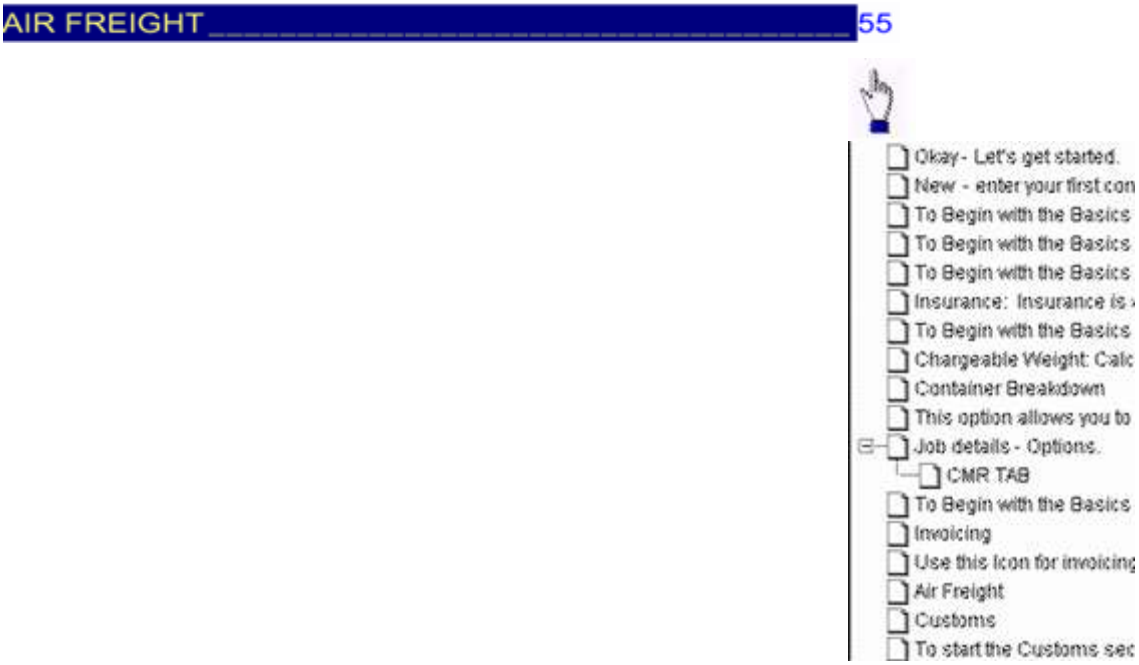
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How to use Freightdata 2000 Help

To use this guide use the “Find” option in the edit section
As shown in this example below.





Welcome to Freightdata 2000

FD2000 Security

Just before you get started *read this page* for starting procedures.
After loading the FD2 software click from Explorer the Security option in the Freightdata list.

If you Click into Freightdata without going to security first you will be warned that security has not registered your software. Therefore *Cancel* and click the security program

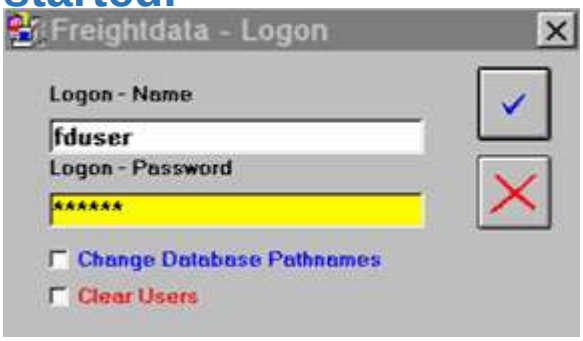
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Freightdata Security



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Okay - Let's get started.



Start with this simple PASSWORD*:* ***fduser*** & Logon: ***fduser***
Your administrator will organise a better password – this is used to get you started if you don't have a password at the moment.

Your system automatically creates the first branch, however your System Manager can add more branches and departments.
This is an important factor in the creating of a Job as the Branch and Department chosen here will be allocated to that Job for Management Analysis.
Also the choice here will influence what details are printed on some of the Documents*.*

This screen will default to the last Choice made on this PC. The Status Bar at the bottom of the screen will show your current choice on exit. This can be changed from the File Menu providing a Job is not open.

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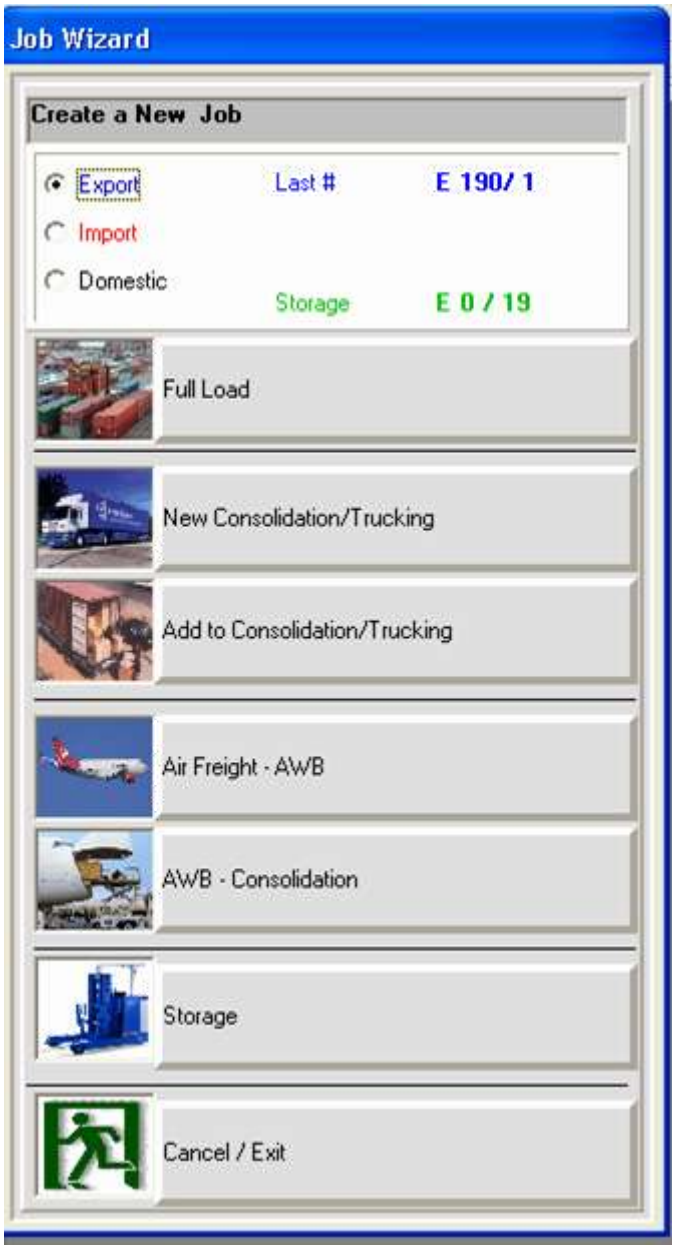
If you are familiar with “Windows” and you know all about “ICONS”, then don’t read anymore - go straight to “New “below. However, if you’re not then we’ll explain. “ICONS” allow you to call programs without long text names. FD2 “ICONS” that appear above allow that function to be carried out, together with the traditional “Windows 98/NT” File, Edit, Help and function key options. When the mouse pointer travels over it, each “ICON” produces a description to help identify the “ICON”. Soon you will recognize the “ICON” without the need for the name. “ICONS” on Freightdata Light and become colored when you call “NEW” and enter the “Job Wizard” with the option of “NEW” or EDIT”. The Job Wizard is your guide to the system. It will appear as below when you Edit or Print documents with different prompts.

New - enter your first consignment.

To open your first consignment click the “File” or “ICON” button here
You will automatically call



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However, if you're not then we'll explain. "ICONS" allow you to call programs without long text names. FD2 "ICONS" that appear above allow that function to be carried out, together with the traditional "Windows 98/NT" File, Edit, Help and function key options. When the mouse pointer travels over it, each "ICON" p
roduces a description to help identify the "ICON". Soon you will recognise the "ICON" without the need for the name. "ICONS" on Freightdata light and become coloured when you call "NEW" and enter the "Job Wizard" with the option of "NEW" or EDIT". The Job Wizard is your guide to the system. It will appear as below when you Edit or Print documents with different prompts.

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You now see displayed the **Storage, Full Load, Existing** and **Cancel** Buttons above. First, click the **Full Load** button to create a new Shipment according to the Flow ***E.I.*** (IMPORT, EXPORT or DOMESTIC) of the job you wish to create. The last reference created for the Flow you have selected is displayed adjacent to selected button. To edit or add a position ***(consolidation*** existing Movement, select the ***Existing*** option button and by clicking the New Position in the consolidation Manifest a new shipment can be added. (*See consolidation/Manifest.)* Selecting the ***Set as Default*** check box causes the currently selected Flow to be the default for this workstation. This option can also be accessed via the button on the toolbar.

Storage - acts in the same way as a new shipment but provides a "0" as part of the reference, signifying the reference is unallocated to any particular destination or service. *(See "Allocate Cargo")* ***Cancel*** *returns you to the start menu.*

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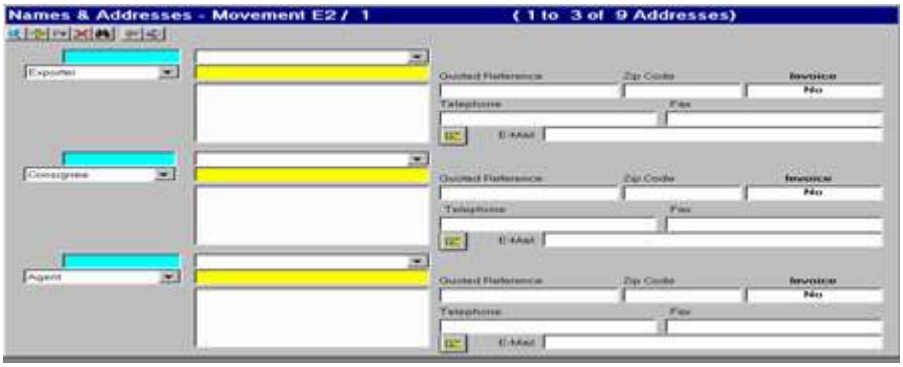
To Begin with the Basics of a New Consignment.



If you are not certain you have completed this section, then re-read **"GET STARTED".**
From the New Cargo section on the previous page you can now access and enter via the "ICONS" above, the details of each consignment.

To help you get started; this section covers the basic information on how you book your cargo into Freightdata. You will be able to refer to the individual sections in the following pages in greater detail later in the Manual. However, you should have investigated the "**GET STARTED" section** at the beginning of the Manual, and completed the required

Next Step: The Customers and other parties involved in the shipment. You can click on the list to select a name and if you need to add new names, select new to add them to your consignment. The names will be added to your database. You will notice that a blue tick appears in the "ICON" you were using. This is to remind you which consignment you have entered, and completed.

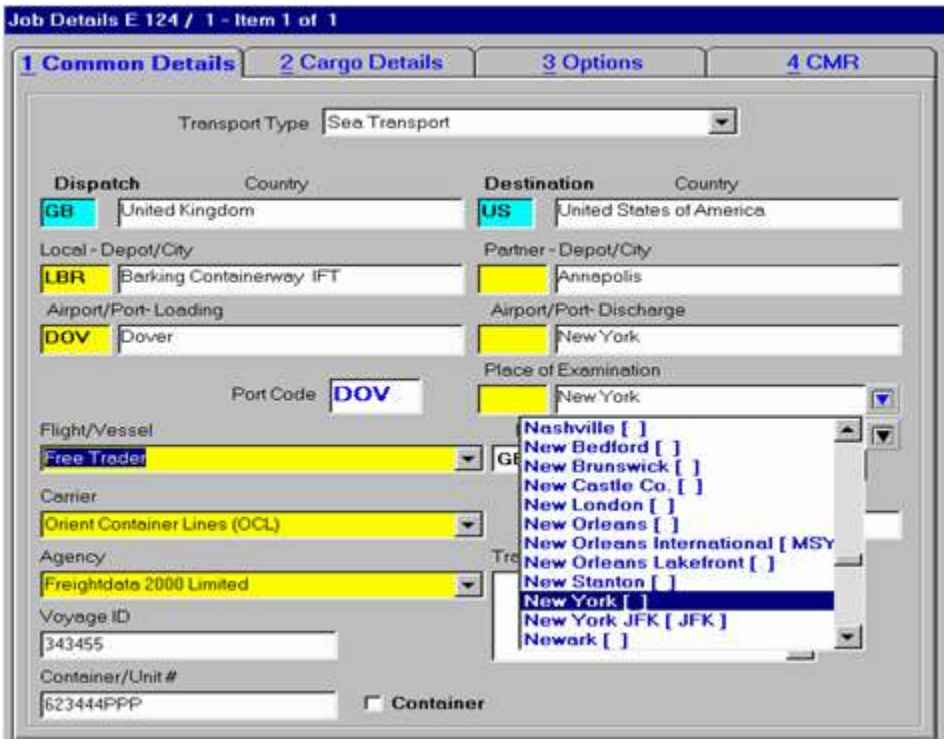


To charge a customer or relevant party, remember to "Click" the Invoice Box, to change the "NO" to "YES". This will allow Invoicing to be activated by the charge screen. Invoices will alter this box to "CHARGED" or "READY".

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To Begin with the Basics of a New Consignment.

First access your Job Details by clicking the Job Details Icon. If this a single consignment or the first in a groupage then enter the Common Details of the consignment. Do this by clicking the Common Details Tab as shown.
Use the “pull down” boxes where available, they will be linked to information
Set-up earlier in your data base. When you have finished with this TAB, click the cargo TAB. (ALT2) on your keyboard.

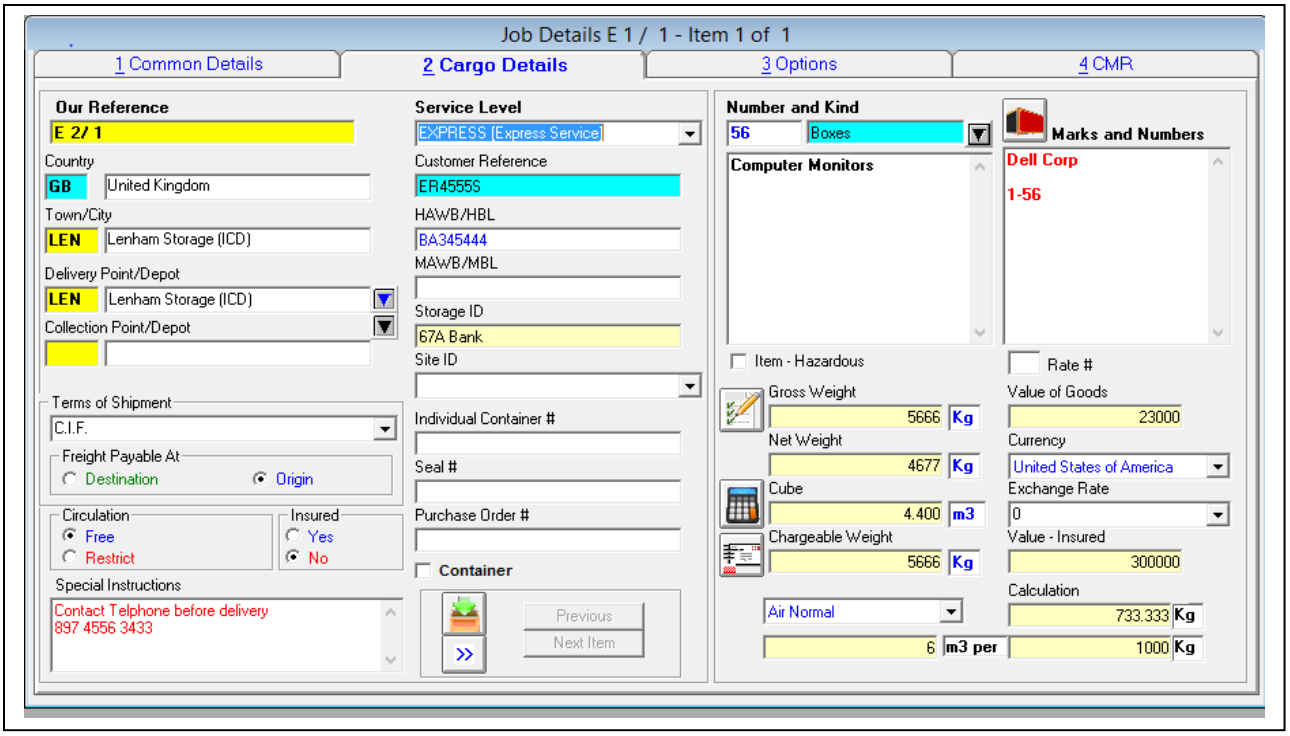


To Begin with the Basics of a New Consignment.

Enter details in “Our Reference, then Customer reference etc.
Continue with each section, through to Weights & Measures, Town & Destination Points. Marks & Numbers, Terms of Shipment etc, if the information is available.
Try the Dimensions Calculator, you can go forward if you like in the Manual to look at its features. INDEX under “Dimensions Calculator”.

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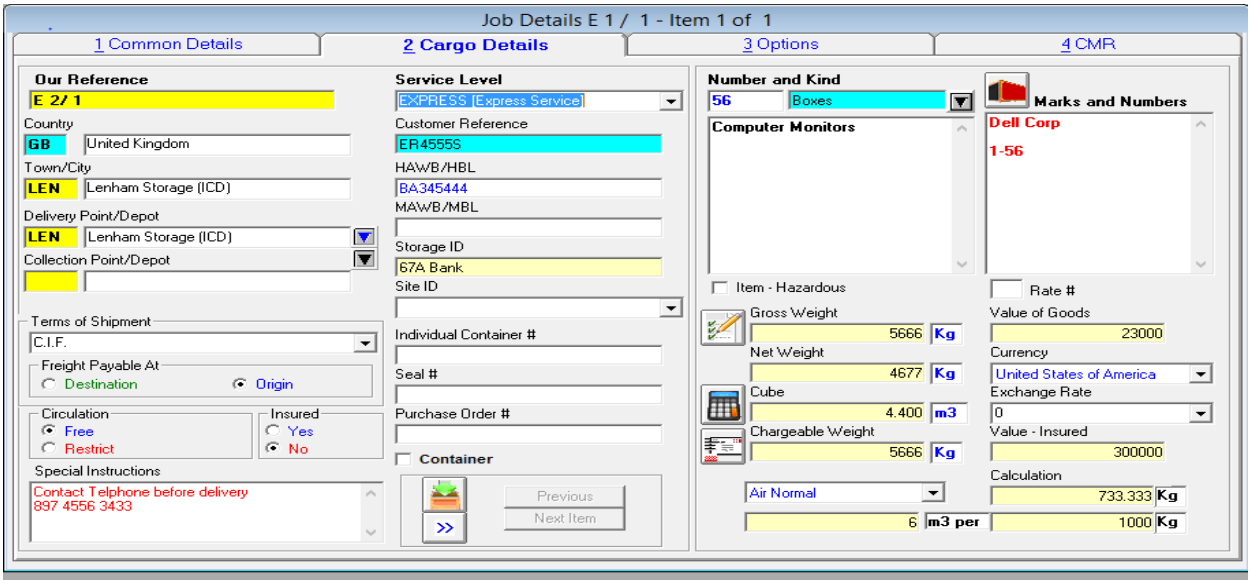
Insurance: Insurance is activated when the “YES” radio button is “Clicked”. Editing and printing of the insurance document is explained in the printing section. When completed Click “Goods (ALT 3) on your keyboard.



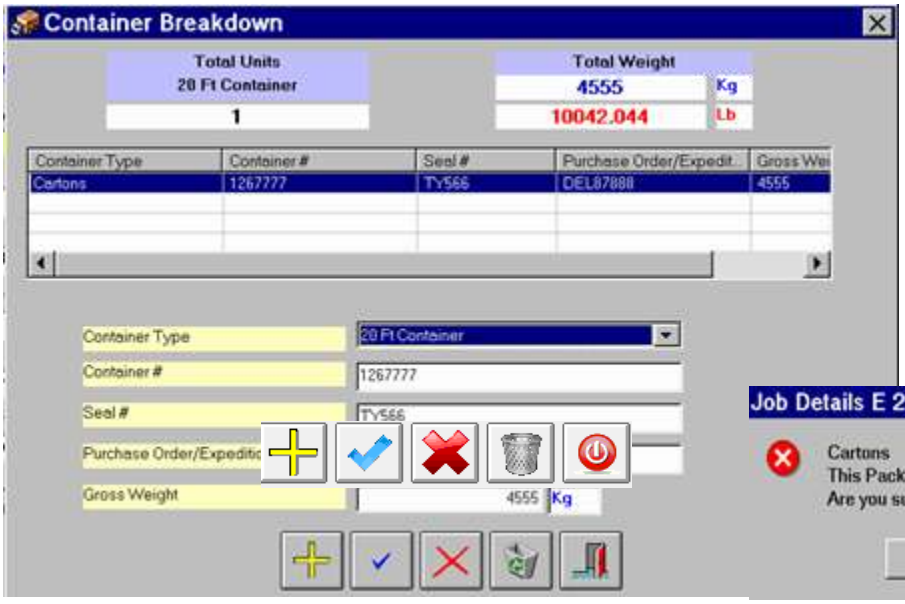
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To Begin with the Basics of a New Consignment.

Enter here your number of Cases, Cartons etc., together with Marks, Numbers and details of the consignment. Try the Dimensions Calculator, you can go forward if you like in the Manual to look at its features. INDEX under "DIMENSIONS CALCULATOR". Don't worry about the Packing List that's explained later in the Manual.

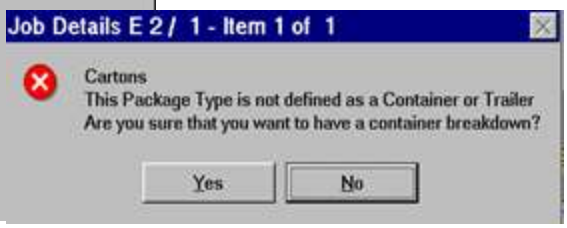


Chargeable Weight: Calculations can be initiated once a *Cube* value has been entered. To Calculate the Chargeable Weight, select a Chargeable Weight calculation from the Drop Down List box on the right Clicking the calculation box displays the result of the standard Chargeable Weight formula in the Calculation box. Double-clicking the calculation box transfers the calculation to the Chargeable Weight text box. Figures for calculating can also be entered manually**.** The Calculated Chargeable Weight will only replace the Chargeable Weight if the Calculated amount is larger. Now click the OPTIONS TAB (ALT 4**)**

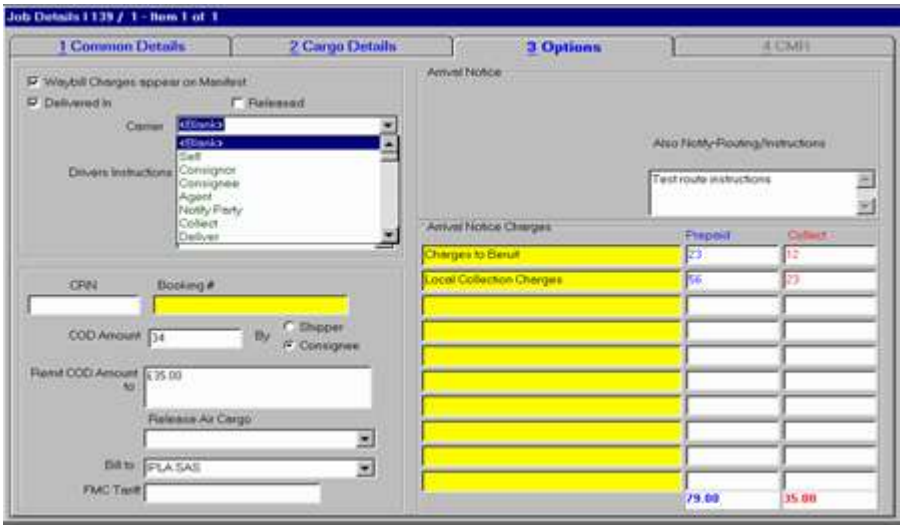


This option allows you to enter and track containers. It includes purchase orders, Container type other information for you to total your containers and control their loading. Companies loading containers will make good use of this option as it does not refer to cargo.

The warning screen confirms that you



Job details - Options.

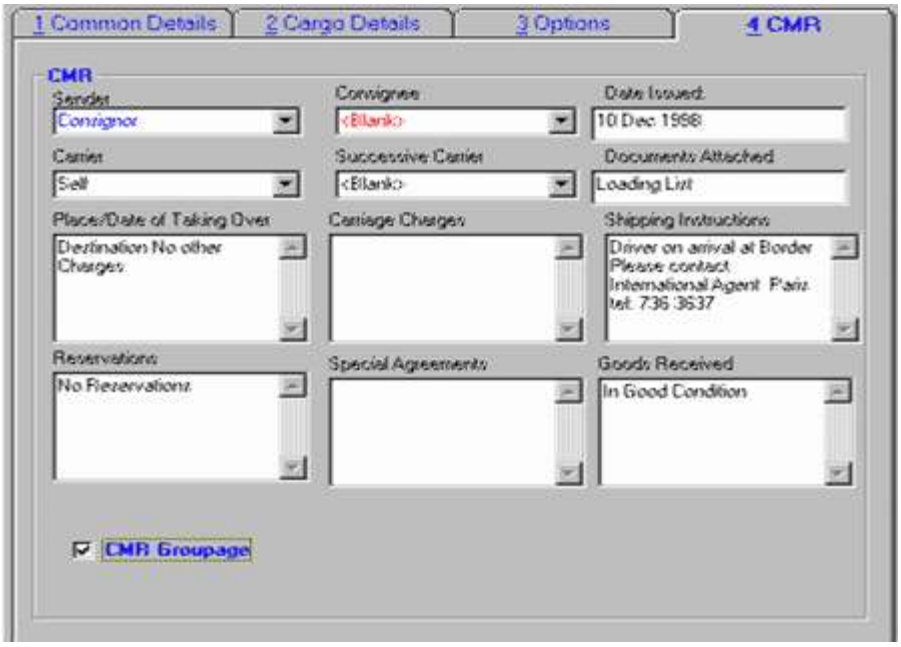


The Options tab gives Bill of Lading and CMR questions, as well as Drivers Instructions for Transport/Collection/Delivery Notes, COD amounts etc.
The CMR section allows you to Select whose address goes into each of the boxes labelled Sender, Consignee, Carrier
and Successive Carrier on the CMR Note. All other fields for entry onto the CMR Note are here except Goods and
Weights. These are taken from the Cargo Details tab or Expanded Description if entered.
The CMR Groupage tick box will indicate to the print section whether this consignment is to be included in a Groupage
CMR or print as an individual CMR. The example shown here is for Imports however Exports options appear in a
similar way but with the heading “Bill of Lading Charges instead of the “Arrival Notice Charges”.

This may also be accessed via the CTRL + F2 key or the Job Details button on the toolbar. Once the button has been
pressed, a tick will appear on the button to show that section has been filled in. There is several pull down boxes for
Bills including Bill to, as shown in the diagram below.
Once you have completed the cargo details, you can now charge the consignment. Go ahead to the ***“Invoice a***
Customer” section, which will explain the charges procedures.

CMR TAB

The CMR tab gives Bill of Lading and CMR questions, as well as Drivers Instructions for Transport/Collection/Delivery
Notes, COD amounts etc.
The CMR section allows you to Select whose address goes into each of the boxes labelled Sender, Consignee, Carrier
and Successive Carrier on the CMR Note. All other fields for entry onto the CMR Note are here except Goods and
Weights. These are taken from the Cargo Details tab or Expanded Description if entered.
The CMR Groupage tick box will indicate to the print section whether this consignment is to be included in a Groupage
CMR or print as an individual CMR.
NOTE: This Options tab is not available on an Import consignment.

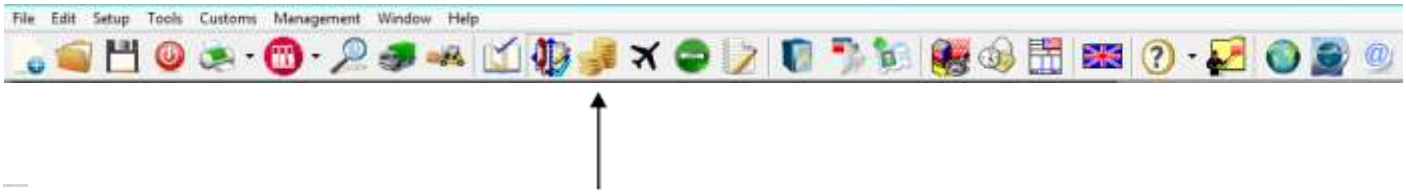


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To Begin with the Basics of a New Consignment.

Invoicing

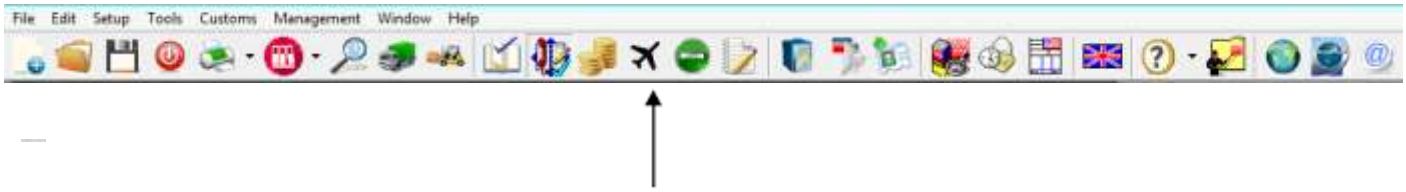
Use this Icon for invoicing your customers. Also accessed via the Edit Menu - Invoice Menu item choice.



Air Freight

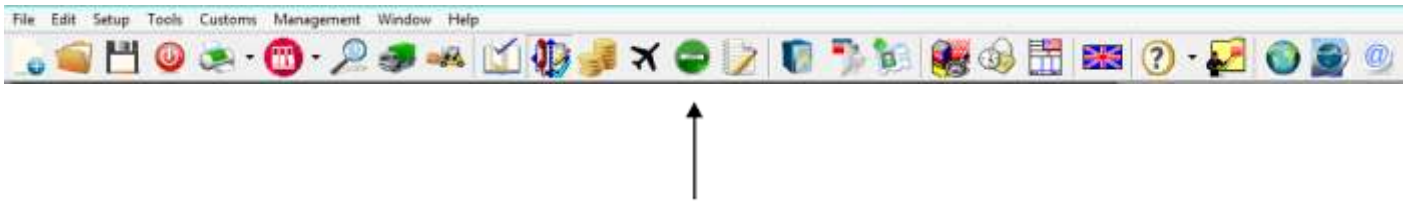
To start the Air Freight section click on the “ICON”

This is also accessed via the Edit Menu by clicking on the Air Freight menu Item.



Customs

To start the Customs section click on the “ICON” This is also accessed via the Edit Menu by clicking on the Customs menu Item.



Shipment Notes

.



Manifests on individual shipment information.

Exit: It’s useful just to know at this stage how to exit from the application. This is accessed via the File Menu by clicking on the Exit

Menu Item. This will exit the program and prompt for jobs to be saved

File Menu - Other options explained.

Open: Once a consignment has been created you may well want to add more details to it or just review your entries or charge extra customers. This is where it is done. :
Clicking on this menu item is the same as clicking the Open Icon on the toolbar.

Save: Use this option to save the current consignment. Clicking on this menu item is the same as clicking the Save Icon on the toolbar.

Print: Use this option to print documents for the current consignment.
Clicking on this menu item is the same as clicking the Print Icon on the toolbar.

Exit: This option is used to Exit from the application. This is accessed via the File Menu by clicking on the Exit Menu Item. This will exit the program and prompt for any open jobs to be saved.

Repeat/Duplicate a Job:

If you wish to duplicate a consignment without repeating all the information again, click the Repeat/ Duplicate file this will take you to the Job Tracking/Duplicate section. See: Repeat/Duplicate section on pages 111-113.



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TOOLBAR - Other Icons explained.

Open



Accessed via the button on the toolbar.
Also accessed via the File Menu by Clicking on the Open Menu Item.

Displays the Edit an Existing Job box from which a Job can be opened and amended.

Select the Flow for the Job you wish to edit by clicking the appropriate option button. The last Job for each Flow is displayed adjacent to each option button.
Enter the Movement and Position of the Job you wish to open. If you enter the Movement Number only, the Manifest for this Movement will be displayed, from which an individual position may be selected and opened.

Close



Print



To select a reference first enter the printing section by clicking Print Icon, or on the Print Menu item on the File Menu.

When printing any type of document, most of the time you have a choice between a Pre Printed document and a Plain Document. A Plain document is printed on a plain sheet of A4 paper, whereas the Pre Printed documents are printed on a document that already has boxes for text.

If a Job is open, then that Job will appear in the Reference box. If you don't wish to print the Job shown then you may enter in a Job yourself. If you print an open Job, then that job must be saved before you can print a document, otherwise you will end up with blank documents.

If no Job is open then the Reference box will be empty and you may enter in the Job to be Printed yourself.

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TOOLBAR - Other Icons explained.

Save 

This option can be accessed via the button on the toolbar.
It is also accessed via the File Menu by clicking on the Save Menu Item.

This option saves the information for the currently opened job and closes it.
This buttons closes the Window displaying

Add 

This option can be accessed via the button on the toolbar.It can also be accessed via the Edit Menu by clicking on the Add Menu Item. Allows the addition of items and addresses to a job. Items may be added one at a time and addresses, three at a time. The box shows how many of each is currently in existence for the current job. See also Add Items and Add Addresses

Languages

The Languages can be accessed by the Flag button on the Toolbar or clicking the Flag icon on the Status Bar.
The flag shown shows the country of the language currently being used.
To Change a Language click the Flag button, a window containing country flags is then show. Click on the flag for the language you want the text to appear in, in the application.



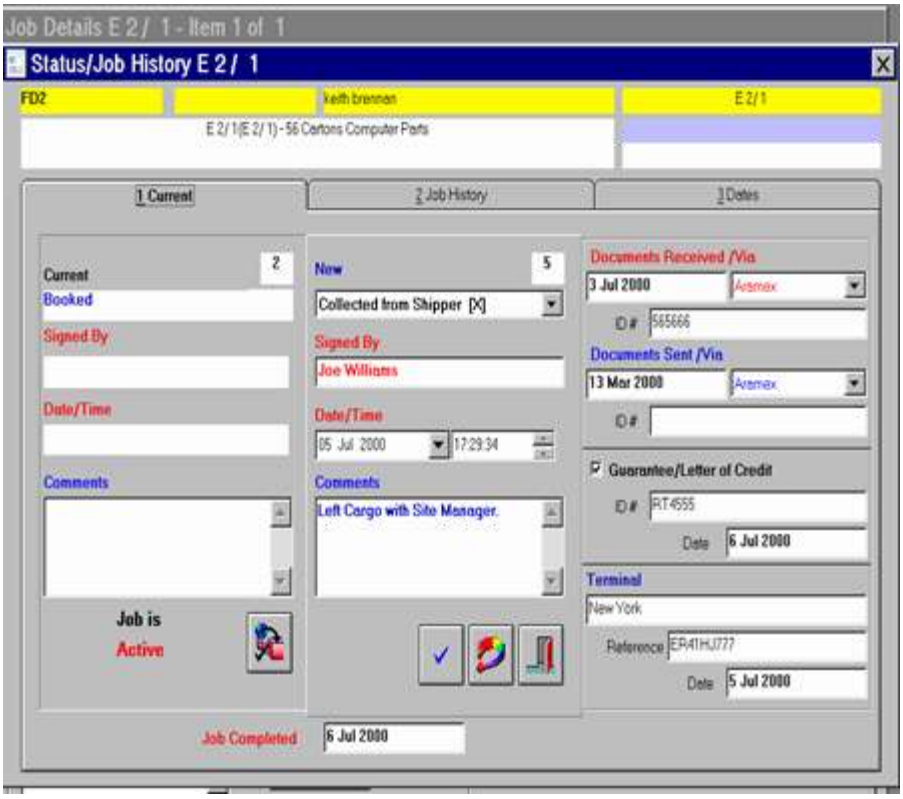
****NB** This can also be used to change the language of the headings printed for all Plain Paper prints.**

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STATUS JOB History

Used as part of the CargoFind this provides a constant update of the cargo status and can be amended t any time as new information is registered in regard to the status of the Cargo.

See CargoFind™ for more information about this facility



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ICONS within forms explained:

	Add		Graph
	Exit		Calculator
	View		Graph Inactive
	Enter		Graph Working
	Cancel		Packing List
	Delete		VIEW
	Export to CSV/Text		More Detail
	Special Instructions		Calculator

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Detailed Explanation

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Names and Addresses

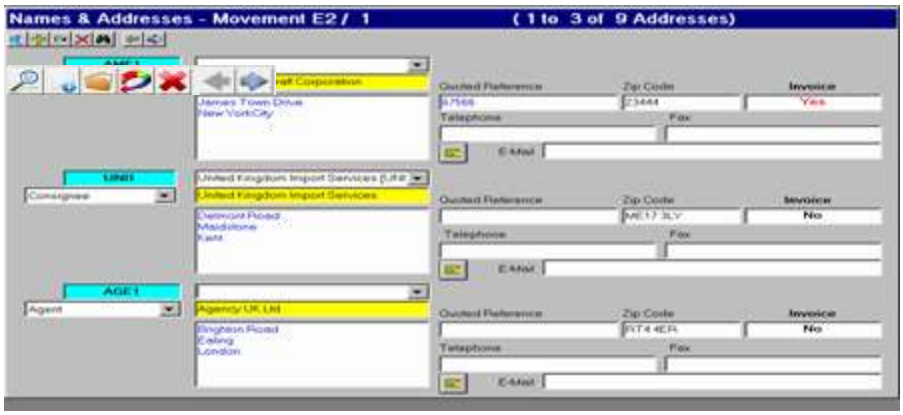
Accessed via the Edit Menu by Clicking on the Names & Addresses Menu Item.
Allows entry of Names and Addresses to be used on the current job.

Ten categories of address are created by default. Up to 99 addresses may be entered for each job. The Name and address of the Customer may be entered in free-type, but may not be invoiced if this is done. Account Names may be accessed by Postal Code and/or Telephone number, or via the List button adjacent to the Address box. Details for each account may be accessed from the List box. The Next and Previous buttons allow the other addresses for the job to be viewed/edited. Clicking the Invoice caption will allow charges to be added for this customer unless the address has already been charged.





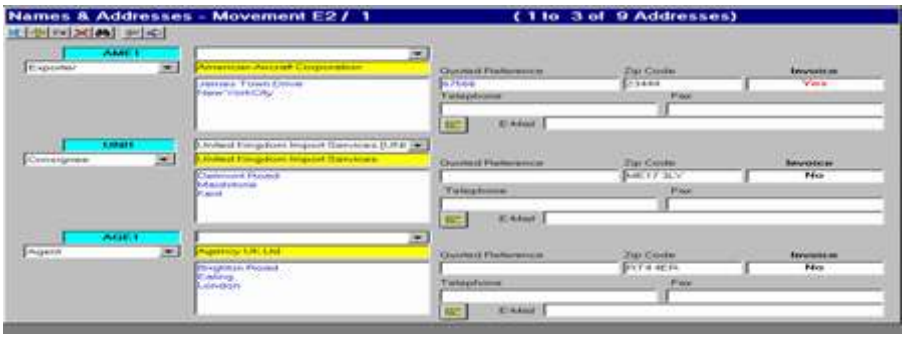
May also be accessed via the F1 key or the Names button on the toolbar. Once the button has been pressed, a tick will appear on the button to show that, that section has been filled in.



Security for airfreight is now built into Freightdata as an option by clicking the check box SECURITY CLEARED.

Name & Address - Categories

Categories option. This option is also available via the Account in the SETUP Menu.
In the names & address option, to ***list*** names within the program, as seen on the opposite page. If after clicking ***List***, you highlight the name required the ***details*** list becomes available. Click the list accesses is made available to the



In the Names & Address section and in Address you can access the ***Categories***
Section as shown below. Press the , this option is used to sort your customers into types. Types shown are ***Shipper, Importer, Agent, Broker and Forwarding Agent.*** The carrier type is used in the tariff.
The display defaults to a check in the Delivery Address and Collection Address check boxes. This means that delivery and collection are made to or from the current address. Clearing either of these boxes, brings up a list of current addresses, choose one of these to give a different delivery or collection address.



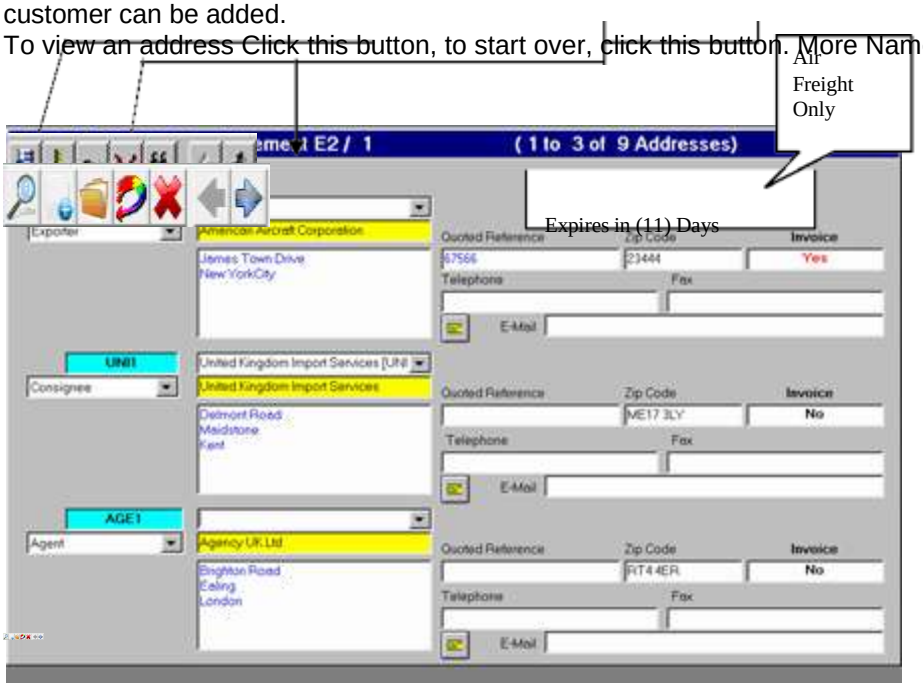
Create a New Address

To Create a New Address

Enter the Names and Addresses section by Clicking on the Edit Menu and then Names and Addresses

To create a new address, you just press the + to provide access to the customer information screen, where a new customer can be added.

To view an address Click this button, to start over, click this button. More Names





If you wish to use the keyboard to find your client in first order, type the name you require and it will automatically display.

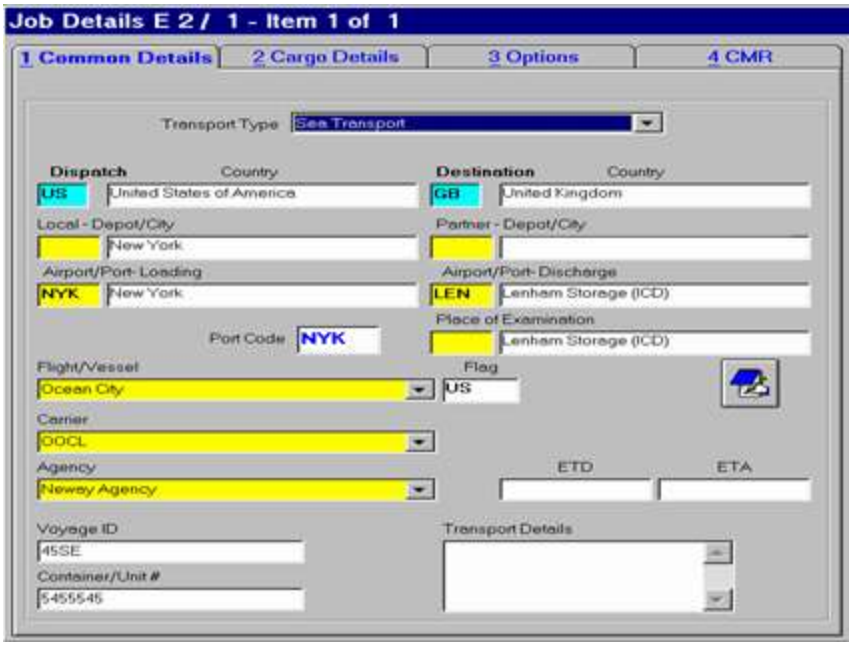
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Job Details - Common Details

Accessed via the Edit Menu by Clicking on the Job Details Menu Item.
Displays the Job Details for the current job and allows you to enter in Movement/Common/Trailer Details for the current Job. Click on the Icon and you will see the example below. Enter common details first and complete the information then click on the second tab to complete the cargo details.



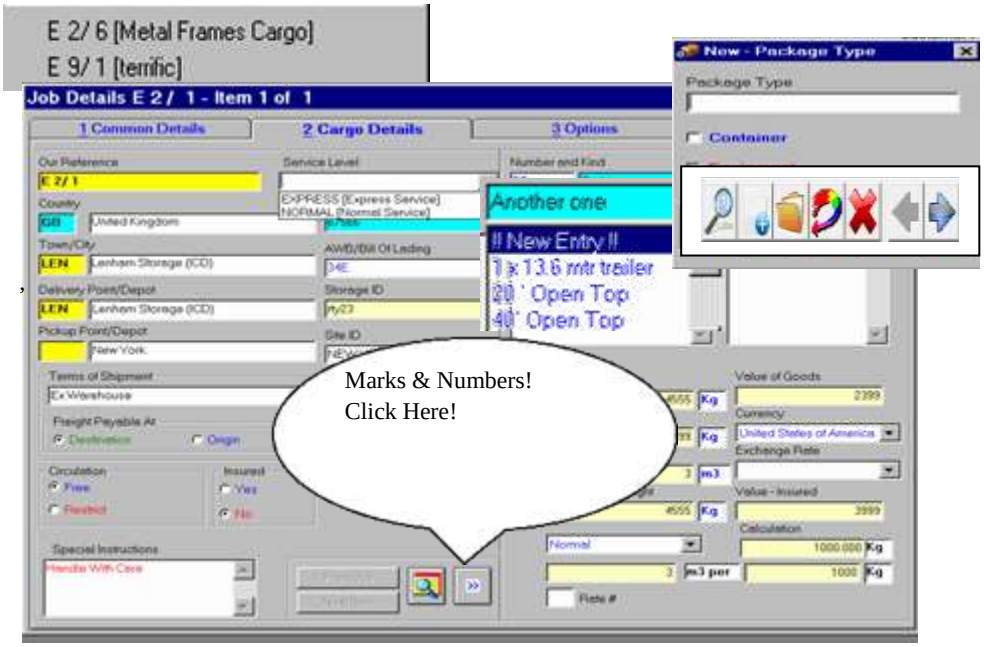
May also be accessed via the F2 key or the Job Details button on the toolbar. Once the button has been pressed, a tick will appear on the button to show that this section has been filled in. This option provides the basis of you groupage or full load information. Once this section is completed as far as groupage is concerned you need not return, as this will be common information for this particular movement.



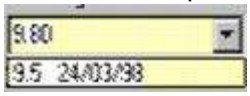
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Cargo Details

Next complete the Cargo details on each section where required. The reference can be changed in **Our Reference** as well as **Customer Reference.** If you change our reference then the **file** will display your original reference and your personalised as the example here shows. To create a new package type go to the top of the pull down option and click “New Entry” Then with the “+” button enter you new description which will then be permanently available. To delete a description click the waste bin as shown in the example.



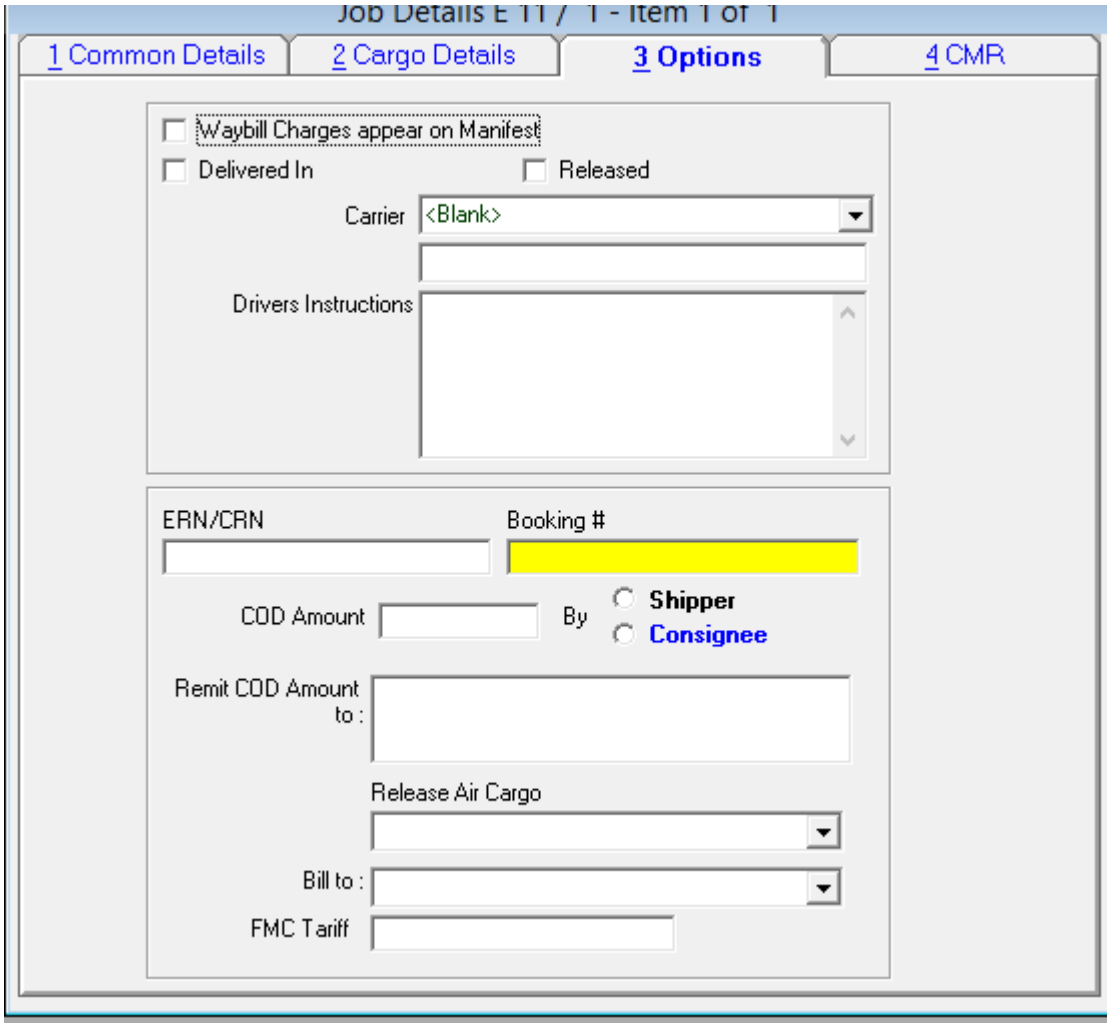
You can place here hazardous cargo, which will be flagged on your prints, exchange rate set up in multiples of currencies and chargeable weight. These are accessed by using the pull down menus explained in the SETUP procedures in the manual. Try an exchange rate now; first pick the currency, See the example here. See the example.



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Job details - Options. Options

The Options tab gives Bill of Lading and, as well as Drivers Instructions for Transport/Collection/Delivery Notes, COD amounts etc. Import options appear the same as our example “Export Options” but with the heading “Arrival Notice Charges” instead of Bill Of Lading Charges.
This may also be accessed via the CTRL + F2 key or the Job Details button on the toolbar. Once the button has been pressed, a tick will appear on the button to show that section has been filled in. There is several pull down boxes for Bills including Bill to, as shown in the diagram below.

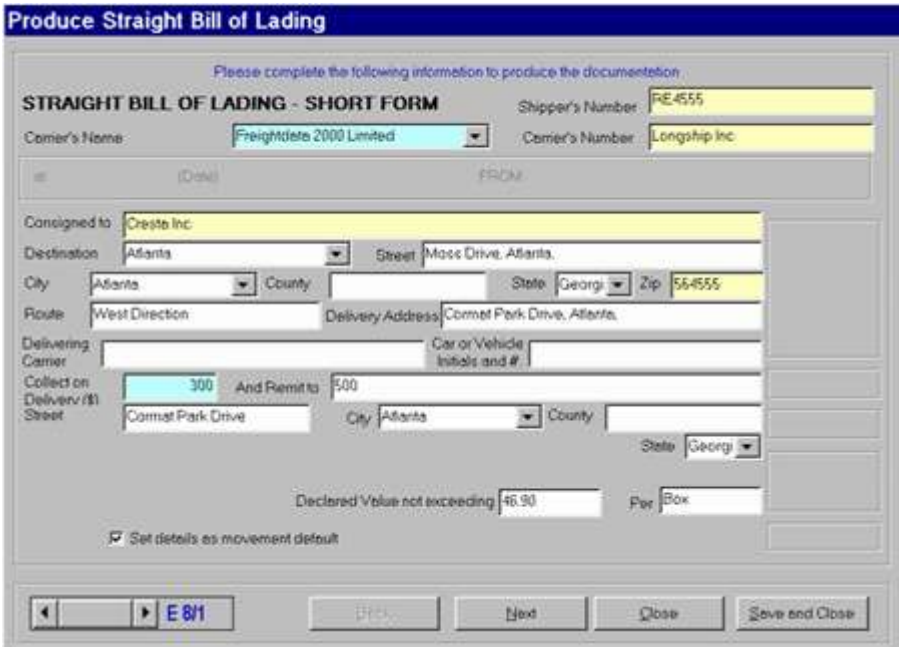


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USA Domestic Straight Bill Of Lading

This again is provided with pull down boxes for completion, with schedule “B” options.





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Collection & Delivery Notes

Click the Collection & Delivery note option in the **"TOOLS MENU"** as shown.

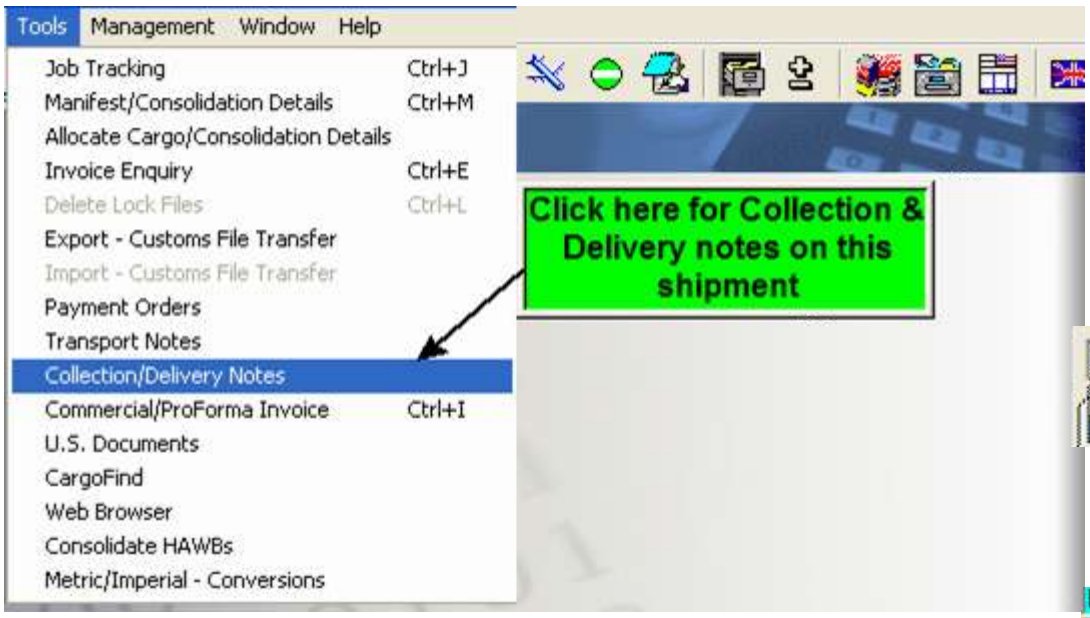
When you first click this option you will see the instruction screen below. For Document Numbers Click "OK" to proceed. In the "**Management Menu**" click on "**Document Numbers**"

Enter your start number for your "Prefix" and start number (See Example Below) followed by any suffix you require in your Local Delivery note. From here you can set-up each document as listed in the pull down list shown.
Click the "+" sign each time to complete the task you choose your completed document type. When you have finished click the check box and exit via the "Red Door".

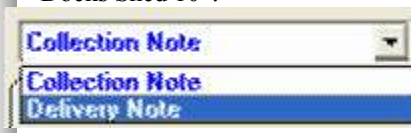
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Collection & Delivery Notes

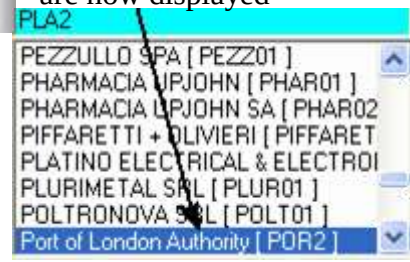
Click the Collection & Delivery note option in the **"TOOLS MENU"** as shown.



Freightdata has taken information you have entered in your main cargo section.
Now we will first create a delivery note for "Tilbury Docks Shed 10".



The delivery options are now displayed



Now Click the consignment details tab for delivery note information on this shipment



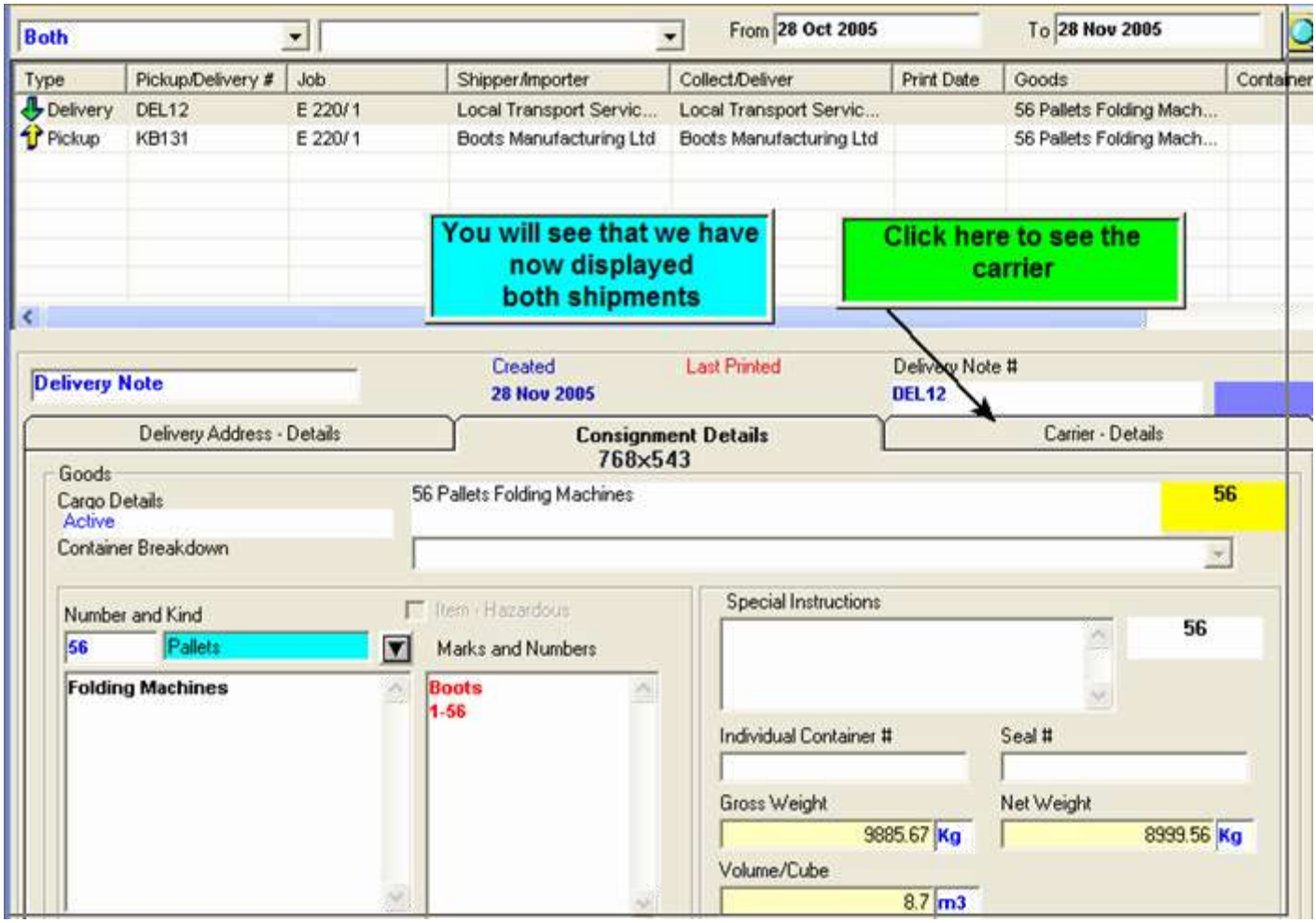


Click here to confirm acceptance



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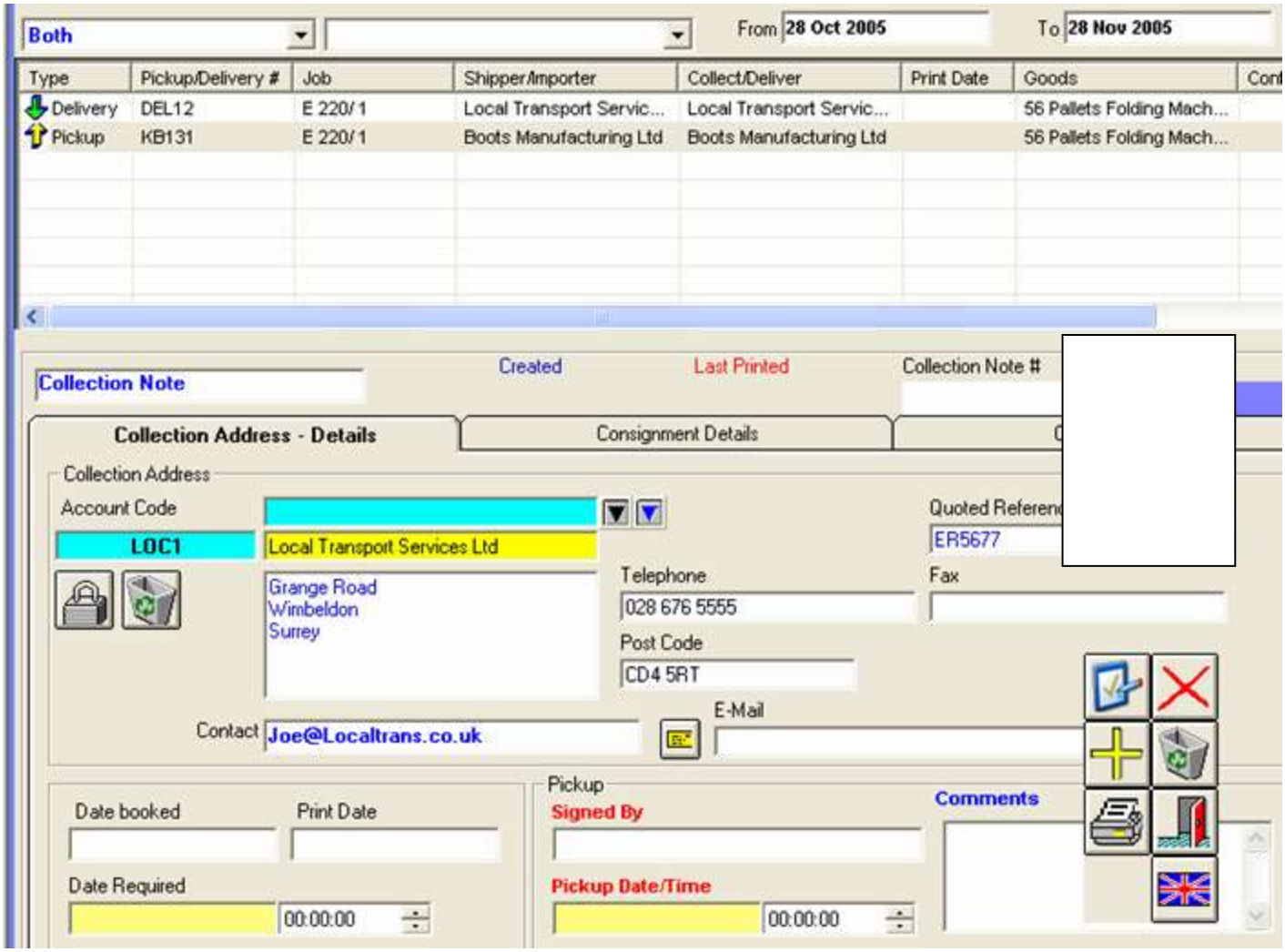
Collection & Delivery Notes



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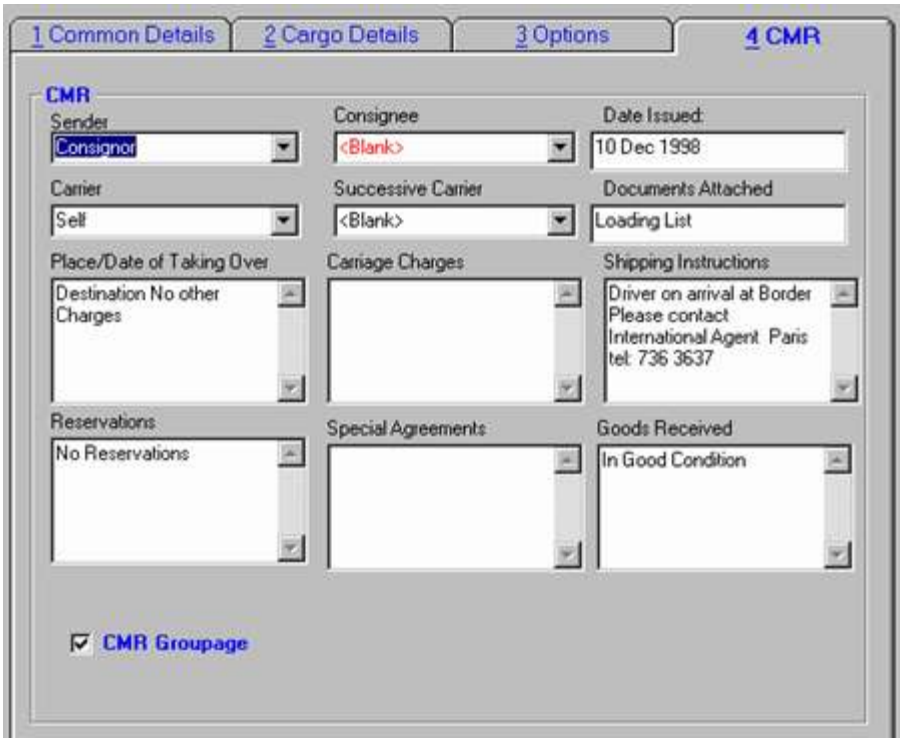
Collection & Delivery Notes

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CMR

The CMR section allows you to Select whose address goes into each of the boxes labelled Sender, Consignee, Carrier and Successive Carrier on the CMR Note. All other fields for entry onto the CMR Note are here except Goods and Weights. These are taken from the Cargo Details tab or Expanded Description if entered.
The CMR Groupage tick box will indicate to the print section whether this consignment is to be included in a Groupage CMR or print as an individual CMR.
NOTE: This Options tab is not available on an Import consignment.



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Job Details - Cargo Details

Accessed via the Edit Menu by Clicking on the Job Details Menu Item.

Allows the entry of Number and Kind and, Marks and Numbers for the current item on the current position. A selection of package types is available from the drop down list box. The Next and Previous buttons allow other items to be edited. The box caption shows the number of the item currently being edited, and also how many items there are.

Items may be added with the “Add” menu selection from the Edit menu.
Add may also be accessed via the F2 key or the Job Details button on the tool bar. Once the button has been pressed, a tick will appear on the button to show that, that section has been filled in.

Packing List

The Packing List is accessed from the Cargo Details section. To enter the Packing List click on the Packing List button below the Goods Description box.
The Packing List allows you to describe in more detail each Package making up an individual Item and each object making up a Package.

To add a Package to a Packing List
Click the ‘New’ button at the bottom of the form. (The button text changes to ‘OK’) Fill in the text boxes with the required information.

Note*:* If you are creating a new Packing List, that is one with no saved records for the Item you are currently on, then the Type, Description, Marks, Weight and Cube will have already been filled in from the Cargo Details and Weights & Measurements sections. The ‘OK’ button will be visible instead of the ‘New’ button.

Packing List Continued…

To add Extra Details to the Package then click on the  button. Fill in the details on this form and then click the  button to go back to the Package Details form. To save the details click on to the ‘OK’ button. (The button text changes to ‘Update’)

To Edit a Package in a Packing List
Select the Package you want to edit from the drop down list box at the top of the form.
Make any changes that you want and click on the ‘Update’ button. (The button text changes to ‘New’)

To Delete a Package in a Packing List
Select the Package you want to delete from the drop down list box at the top of the form. Click on the Delete button and answer ‘yes’ to the question to confirm the Deletion.

To add an Object to Package
Select the Package you wish to add objects to from the drop down list box at the top of the Package Items form.

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Click on the button at the top of the form. The Item Details form is displayed. Click on the 'New' button. (The button text changes to 'OK')
Fill in the text boxes with the required information and click on the 'OK' button. (The button text changes to 'New') Click on Exit to go back to the Package Details form.

To Edit an Object in a Package
Select the object you want to edit from the drop down list box at the top of the form. Make any changes that you want and click on the 'Update' button.
(The button text changes to 'New')

To delete an object in a Package

Select the object you want to delete from the drop down list box at the top of the form. Click on the Delete button and answer 'yes' to the question to confirm the Deletion.

Note: If any records already exist for the Packing List you are going into then the record for the first Package will be displayed upon entry to the Package Details form. To clear the form for a new record either click on 'Update' or 'Cancel'. The same rule applies to the Item Details form.

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Add Items

To Add an Item

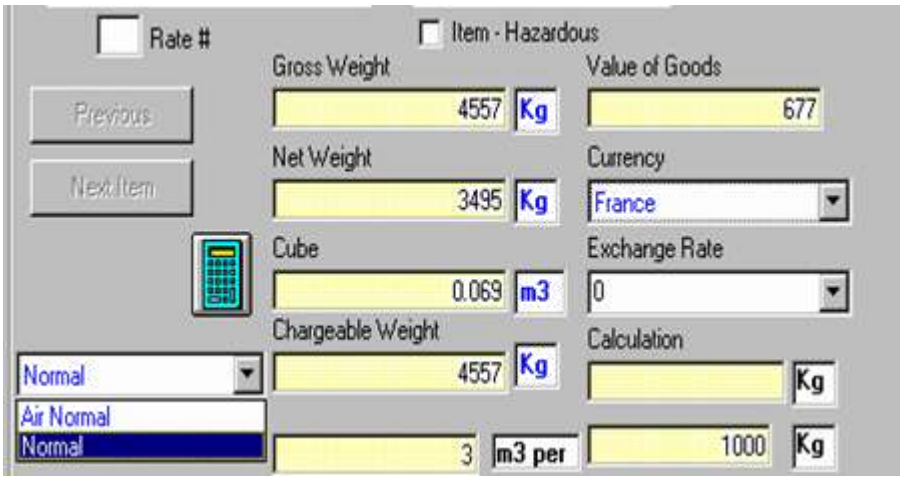


Enter the Add Window via the EDIT or Toolbar

Click on the Items option button in the Select box. This will highlight the Items box. Click OK to add an Item. This is used to add additional cargo to a consignment
which may be required for Customs Documentation or delivery etc.

Job Details -Weights and Measurements

Accessed via the Edit Menu by Clicking on Job Details. This information is entered for each item. Entry of Gross Weight automatically transfers to Chargeable Weight if the latter is blank.



Click the boxes to right of the Weights or Cube to convert the display from Metric to Imperial / US. The final display will
denote whether the units are printed as Metric or Imperial / US.

Chargeable Weight calculations can be initiated once a Cube value has been entered. To Calculate the Chargeable Weight, select a Chargeable Weight calculation from the Drop Down List box on the right Clicking the calculation box displays the result of the standard Chargeable Weight formula in the Calculation box. Double-clicking the calculation
box transfers the calculation to the Chargeable Weight text box. Figures for calculating can also be entered manually.
The Calculated Chargeable Weight will only replace the Chargeable Weight if the Calculated one is larger.

The Currency Drop Do

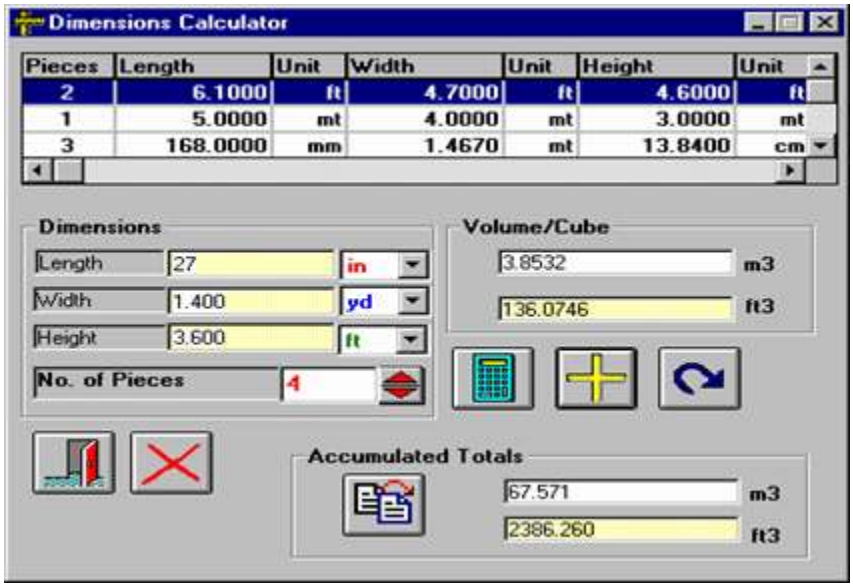
wn List box displays a list of Currency Usage's that may apply for this Job. Selection of the Currency changes the Exchange rates available in the box below the Currency. Shipping Terms is a simple drop-down list, with a setting for Origin or Destination payment. The Freight Payable Terms can be altered independently of the Shipping Terms.

The Next and Previous buttons allow the currently displayed item to be changed. A maximum of 99 items can be added with the Edit - Add menu selection. These buttons also affect the display of items on the Cargo Details box.

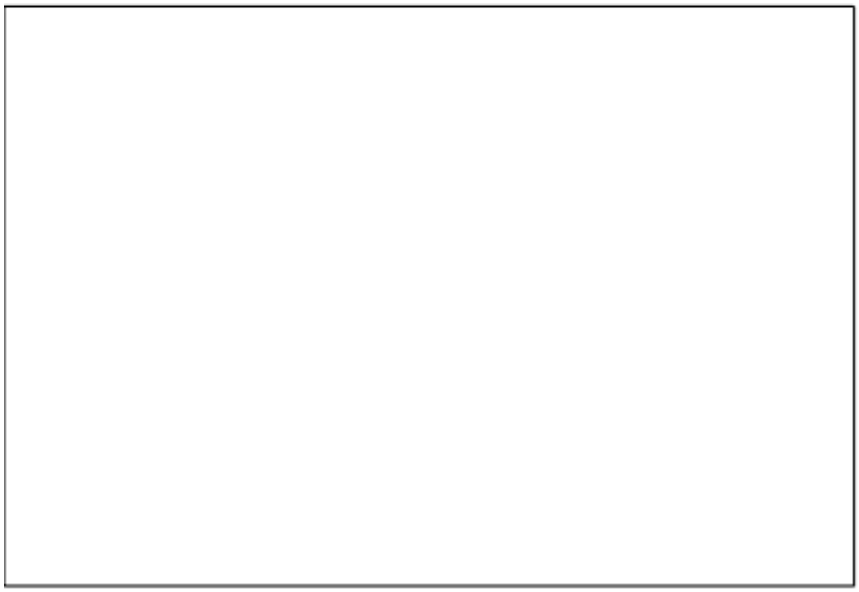
Some Customs information is taken from this window, the rest is available via the Customs Icon or Menu choice.

Dimensions Calculator

The dimensions calculator allows multiples of packages sizes to be entered to calculate Cubes and this can then be transferred directly into your existing Consignment. Which are then saved until as required.
Step 1. Enter your desired sizes; remember you can pick any type of measurement.
Step 2. Press the Calculate button.
Step 3. Press the Add Calculations button and the details will transfer to display below. Repeat Steps 1 to 3 until all packages are entered.
Step 4. Click the Transfer button and this will place the information direct to the Cube area on the Weights and Measures part of the Job Details screen.
The Cancel Button will clear the whole grid.
The ***Redo*** Button will clear those units being entered only.
Click on any line of the grid to edit/delete any previously entered dimensions



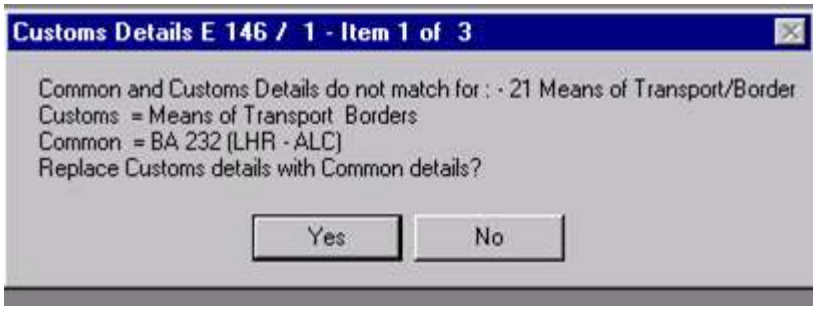
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Customs European - Commodity SAD

The display below may appear on clicking the “Customs Icon” if you have entered details in your customs document not reflected in your common details. This display below shows you have changed “Means of Transport” but it does not match with the “Common details”. Similar error screens will display, warning you of differences in your main Customs documents.

By entering “YES” your “Common details will replace Customs details in you main entry



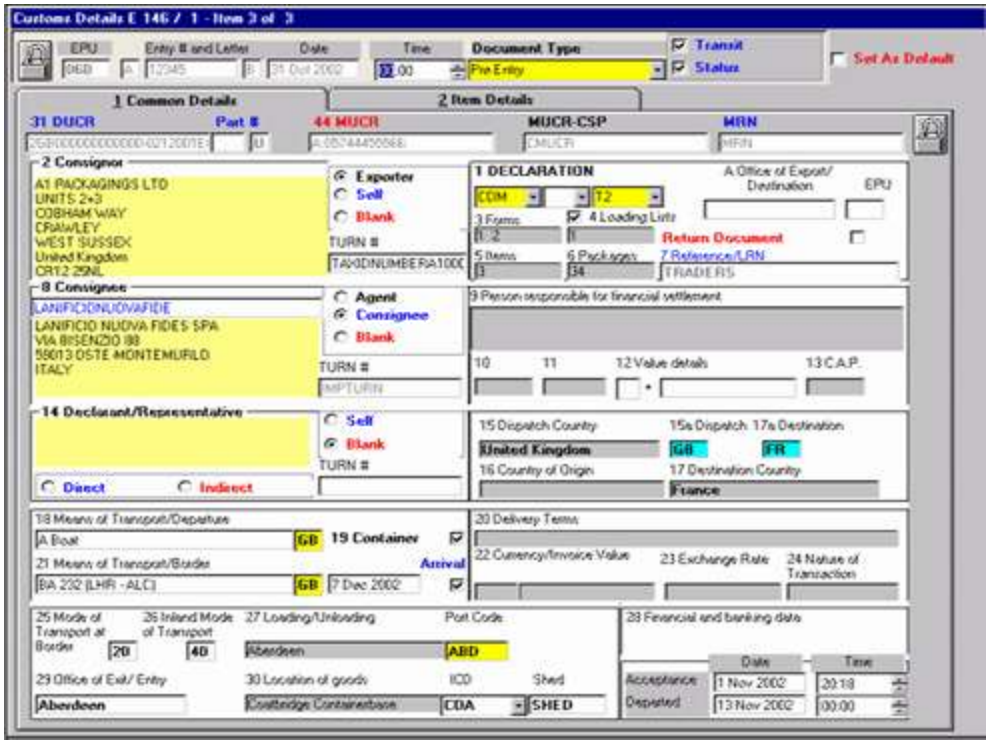
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NES Customs European - Commodity SAD



This option is accessed via the Customs “ICON” or the Edit Menu option.

The Customs Sign displayed here is located in the ICON and Edit procedures (F5). This is used in conjunction with the commodity codes and other features displayed above. You should refer to the main Customs section for more details and information and refer to your local Customs
Offices for advice on completion of any Customs forms.



Invoicing

Accessed via the Edit Menu by clicking on the Invoice Menu Item. This form allows you to create invoices for a particular customer by entering onto the charges, set-up in the Charge Description form. ***Print Options:*** **If you don't want to have an item printed *Check the Print*box**



Click the ProForma Invoice box to access this Invoice.
You can also make a note of customer rates, these can be compared to the charges you are now making. This comes as with a set of tools including the dimension calculator
Charge Descriptions



Credit notes **enter** '–' (minus sign) in front of the amount and you automatically have a credit note.
You can use a different charge area such as Charge 9 to create a Credit Note.



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To Invoice a Customer

Enter the Invoice Window by clicking on the Edit Menu and then Invoice.

Firstly you need to select whom you are going to charge the invoice to. Drop down the “Charges to” list box, you will see three types of entries. Note
you cannot change “Charge Descriptions” while you are in the Invoice Display””

1) Names surrounded by two stars. These are account names used in the job but, have had their invoice fields left as “No”. See Names and Addresses.
2) An Account Name with “Waybill” in brackets at the end. This is the agents account name and is the person to whom the Waybill is charged.
3) Just the Account name with nothing added. These are Account names with the Invoice field set to “yes". See Names and Addresses.

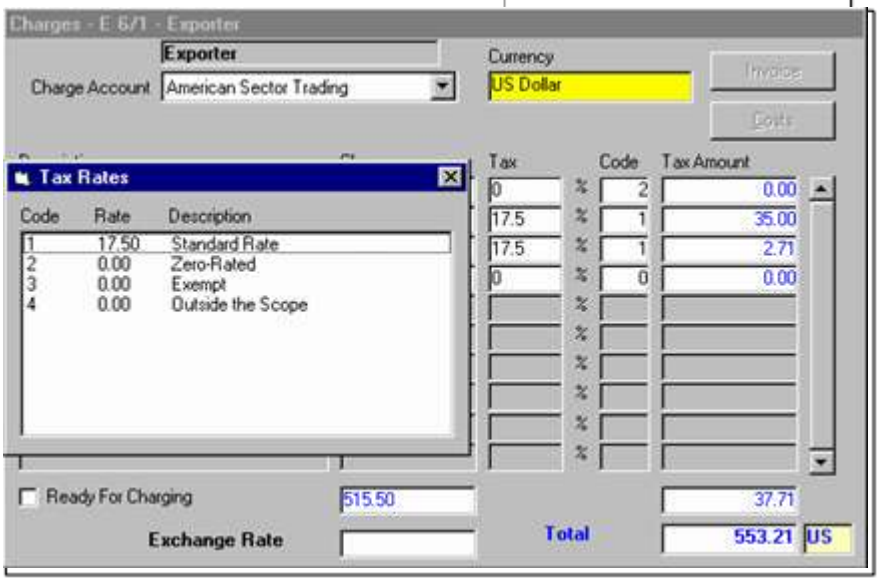
Select either type 2 or 3 to go into the charges box depending on whether you are doing an invoice or a Waybill. Once a valid account name has been put into the charges box, the charge descriptions as set up in the “Charge Descriptions” will appear. Enter in the charge for each description.



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Invoice a Customer - Continued.

Click the Tax display. The Tax and Code will automatically be displayed.
Choose the desired Tax code then “click” - the Tax Amount and Total will automatically be worked out and put in.
Once you have entered all the Charges in, check the box “***Ready for Charging”.*** Once the Charge button has been pressed you are no longer able to go back and change anything on that Invoice. The Invoices and Waybills will only print if they have been charged out.





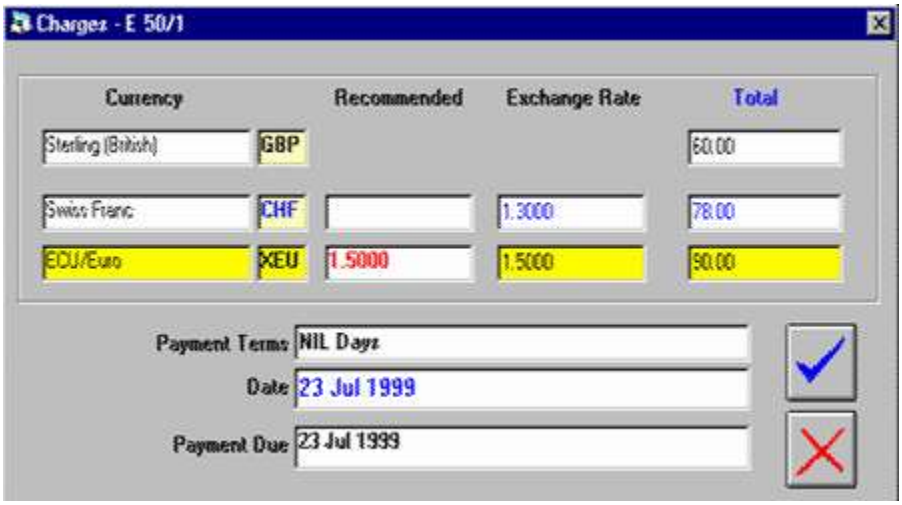
Invoicing is also available via the F6 key and the Invoicing button on the toolbar. Once the button has been pressed, a tick will appear on the button to show that section has been filled in. 

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Euro Invoice

The use of Triangulation in Euro Accounting makes it necessary to show the Euro equivalent on Invoices and Credit notes issued between two countries within the EU.
Freightdata uses the country of the customer being charged to decide whether to print the Euro equivalent. *(See: Setup – Account*) In turn the country will be checked to see if it an EU member. *(See: Setup – Places – Countries*)

The final Invoice Screen will show the local currency equivalent and the Euro equivalent where necessary. There must be an exchange rate for the Euro and you can either alter/enter this or give a Euro total in which case Freightdata will calculate the Euro exchange rate. On this screen you can also alter the foreign currency exchange rate, payment terms and Invoice/Credit Note issue date.
On completion use the OK button to accept the values shown.



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AIR FREIGHT

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Air Freight - Carrier IATA

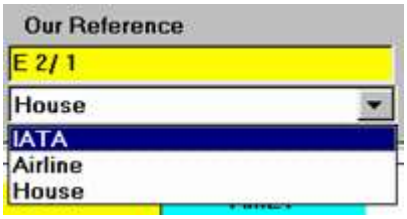


To start the Air Freight section click on the “ICON”
This is also accessed via the Edit Menu by clicking on the AirFreight menu Item.
This option contains Air Cargo information for each position. The Carriers tab contains boxes for the Issuing carrier, their agent, and general routing information.

.

Selecting a carrier fills in the Carrier, Code and Air Waybill prefix and also the account number. The Agent is selecting from Self, Shipper or other, the latter giving a list of IATA agents to choose from. This will automatically fill in IATA code and shippers account

The Airport of departure and destination will be filled in from previously entered information. Click the appropriate box to bring up lists of carriers or airports



The Air Waybill number drop down box gives the user the option of creating an IATA/ Neutral Air Waybill, an Airline Air Waybill or a House Air Waybill.

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IATA AWB Number.

An IATA bill will pick up the Carriers Prefix.
Click on the Serial Number part to bring in the next number or a reserved number.



Once an Air Waybill Number has been selected, it cannot be re-assigned.
An Airline bill will pick up the Carriers Prefix.
The Serial Number can be entered manually. This number is then checked (according to the Duplicates criteria) against all previously issued Air Waybill numbers. (IATA or Airline)

A House Air Waybill allows manual entry of both the Prefix and Serial Number for the Master Air Waybill number. If the carrier has been selected the prefix will have already been entered.

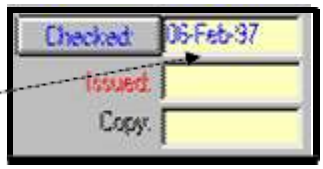
Click the button on the right to access the House Air Waybill Number.
Any combination up to 20 Characters may be entered here.

See **Reserving Air Waybills** for further information on IATA air waybill number allocation.

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IATA Air Freight - Dates Frame

This area of the screen shows when the information was checked and issued, and when the last copy was made. The bill cannot be printed without checking first, and the date the last copy was made. The bill cannot



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Air Accounting

The second tab is the Accounting Information tab.

This form shows fields corresponding to those on the Air Waybill. Choice of PPD (Pre-paid) or COLL (Collect) will have the effect of putting the appropriate charges into those columns.

The tick box for Print-Company will only appear for a House Air Waybill. Use this to signify that your Company name and address is to be printed as the Issuer on a House Air Waybill. (Some House Bills are pre-printed with your Address).
Fill in these boxes as appropriate.

Extra Air Details - Accounting.

This also shows the Shipper and Consignee names and addresses
Click the down chevron on the top left-hand corner, this will display a list of alternative parties for this shipment.
The *Magnifying Glass* will display a list of database customers available. Any alteration of the jobs addresses will update the air freight area when the airfreight screens are displayed. By Clicking in the address box area Names and Addresses can be entered in manually or existing details altered. However, If the Air Waybill has been issued the Shipper and Consignee addresses will display exactly as they were when the Air Waybill was printed.
Other information such as the Quoted Reference and whether this account is to be charged can also be entered.
The Shipper will also display the expiry date for Secure Cargo if appropriate and an entry is made into the Handling Information as to whether this shipment is Known or Unknown Cargo. The DOT Listed Agent Number is entered into the Accounting Information box using details from the Company Details section.

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Air Freight -continued

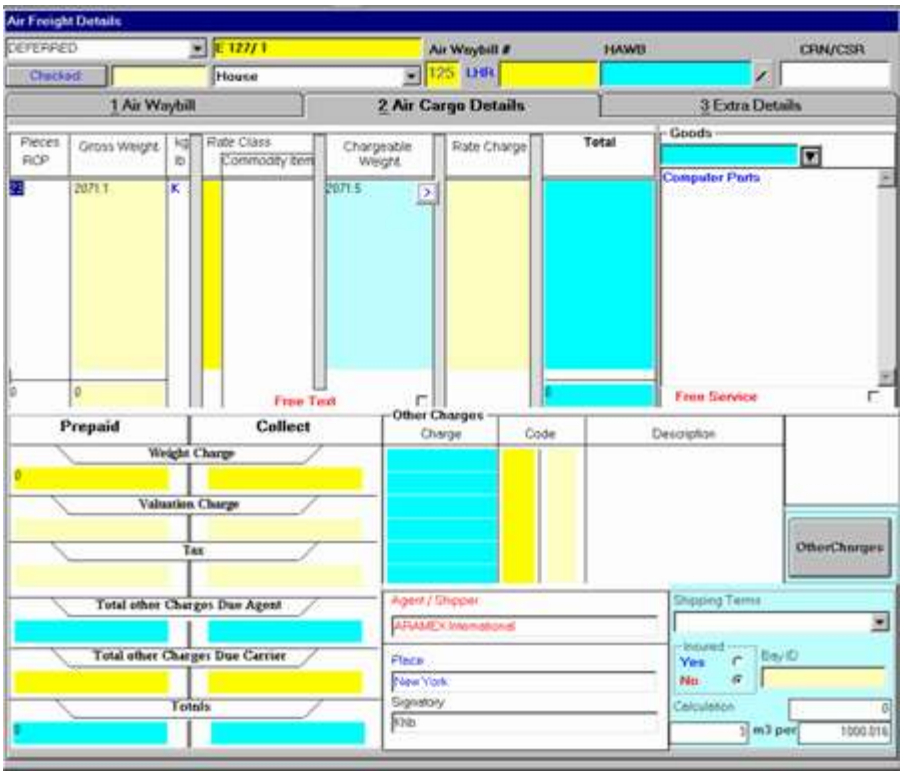
Set as Default

This window also contains a check box labelled “SET AS DEFAULT”. If this is checked (Ticked) certain fields will be stored in the computer registry so that the next time an air freight job is entered these values will automatically fill the boxes. The items that are stored are:

- HandlingInformation
- AccountingInformation
- Currency
- Value for Customs
- Value for Carriage
- Insurance
- Print-Company
- Weight Charges Prepaid or Collect
- Other Charges-Prepaid or Collect
- SCI
- Signatory
- Agent Status (Self, Shipper or Other)

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IATA Air Cargo Details



This tab is used to enter the Weight Charges information and goods description. The first lines will be filled with any known data such as weight, number of packages and cargo description for the first 6 items for this position.

The Rate Class field is updated from a Rate Classes list supplied with the system, updated by the user. This will provide information for the computer to calculate the charge. Weights entered in Kilos are rounded to the half Kilo; weights entered in Pounds are rounded to whole Pounds. The Up and

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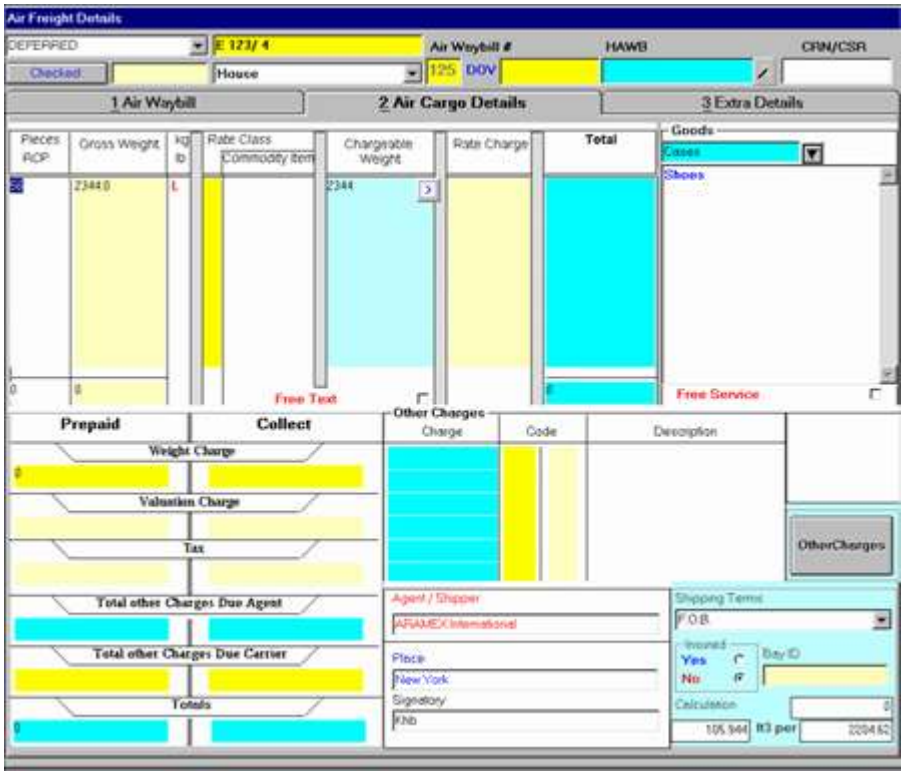
IATA Air Cargo Details - Continued

Down arrows are used to enter additional lines which will appear in the grid below.

Check the Free Text box to give any additional information, which will print below these Weight Charge lines.

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IATA Air Freight - Charges.



The final tab on the Air Freight details screen is the Charges tab.
Weight charges entered on the previous Goods tab are brought in automatically into either the Prepaid or Collect column depending on the option picked on the Accounting screen.

Other Charges:

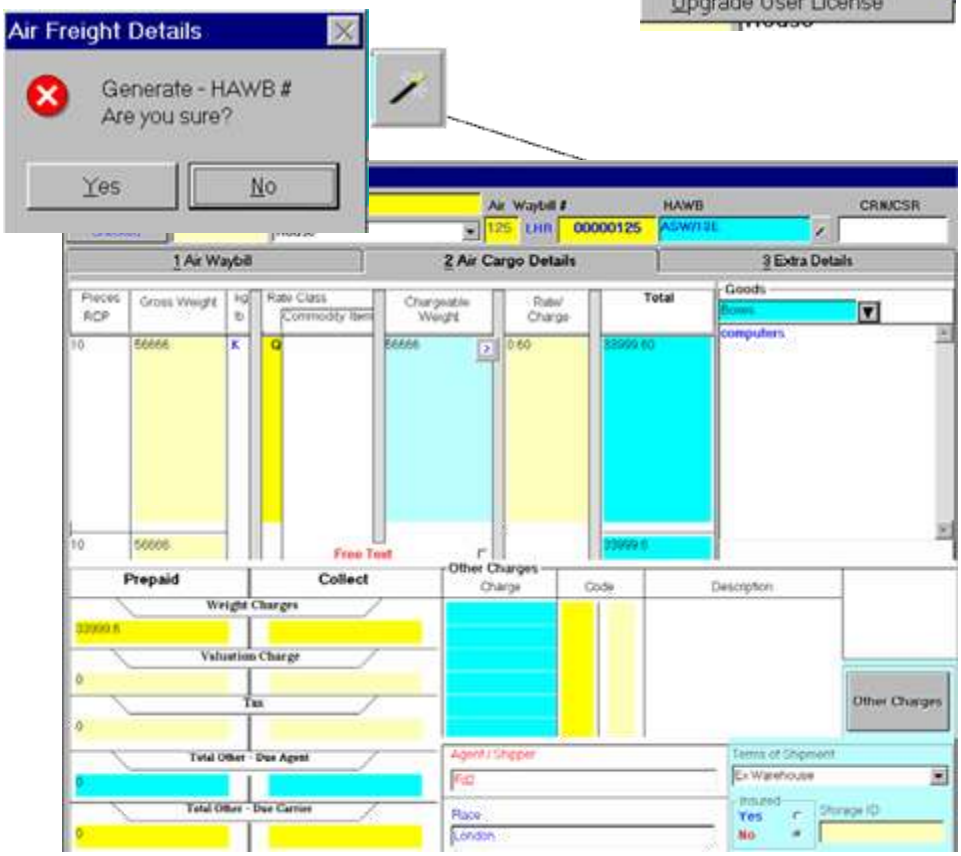
Other charges are entered using the IATA codes provided with the system. Again these can be updated by the user. Enter the charge and choose between Agent and Carrier in the options. Clicking on the Code will bring up the list of Other Charge codes. Up to 18 entries can be made. Again the Up and Down arrows are used to move up and down the grid area.

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IATA Air Freight – Charges



You can generate your own house Air Waybill numbers by clicking the wand (You must choose HAWB Option)
To first set-up the automatic number click Management then ***Documents Numbers.***



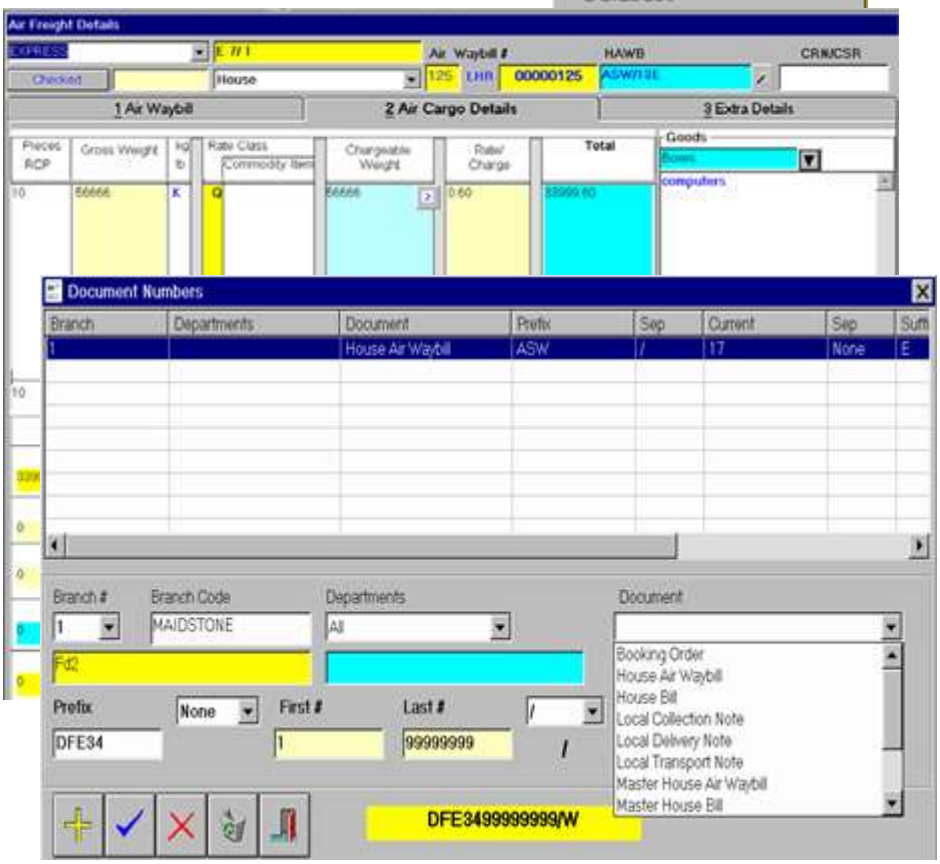
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IATA Air Freight – Charges

Create HAWB Document Numbers



You can now complete your own HAWB or alternative range numbers (see bottom of page) . Note: Air Freight AWAB number is limited to the legal size.

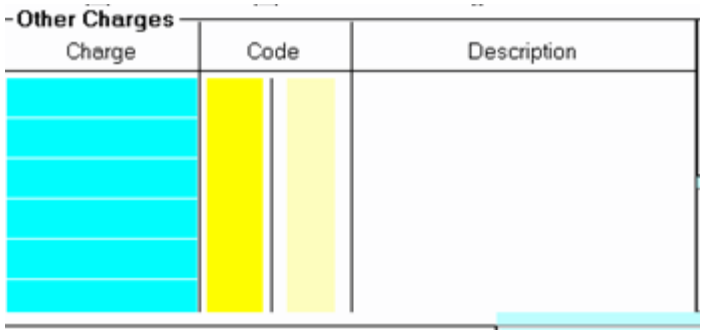


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IATA Air Freight - Charges.

These entries are used to fill the Other Charges box in the Air Waybill.
These charges automatically accumulate into the appropriate Agent or Carrier Prepaid or Collect columns on the left-hand side. This also totals automatically.

An additional Free Format area is accessible by pressing the button labelled OTHER CHARGES.
This will allow as much space as is left after the other charges information entered has been printed. Therefore this will vary.
When entering this information the Charge entry line above is disabled.

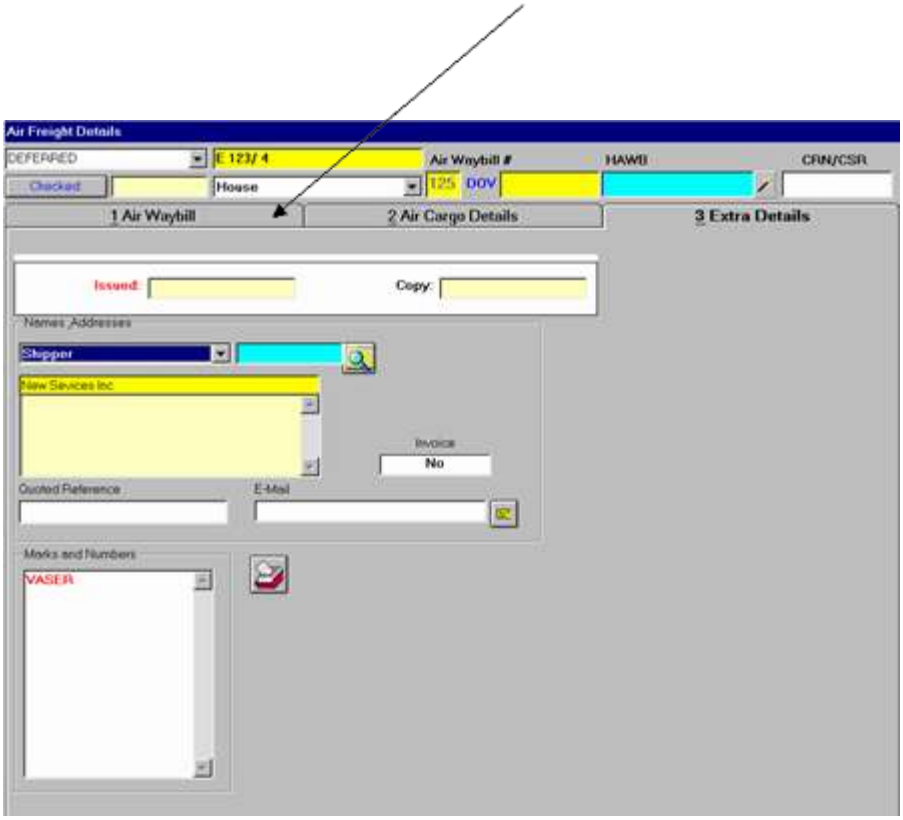


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IATA Air Freight - Charges.

The last part of the completion of the air waybill is the extra details below. From here shipper & general information can be completed.

You can tab back to the main air waybill section with the tabs below.



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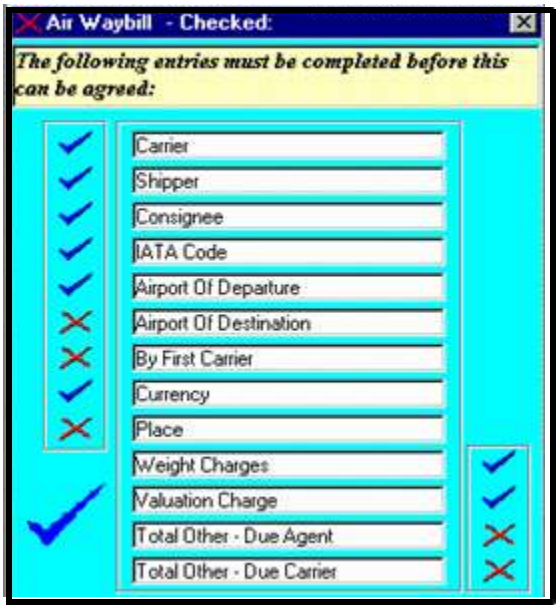
IATA Air Freight - General.

Air Waybill Checking

The information entered must be checked before an Air Waybill is printed. This is done so that in line with CASS recommendations, an Air Waybill is issued once in its original state and the information cannot be altered thereafter.

For this reason the checking process will check mandatory fields and show which fields have not been entered. Only when all mandatory fields are checked as being okay will the date in the Checked field be entered.
At this point an Air Waybill can be printed and once printed the Issued date will be entered. If this is for an IATA/Neutral Air Waybill then this will then disable all fields so that nothing can be altered.
In the case of the IATA/Neutral bill a further check is made on the Air Waybill Number and printing will not take place until this has been allocated.

This is the window that appears when the button labelled **Checked** is pressed. Ticks are placed against correct entries and crosses against information still required.
In the case of charges it is only necessary to enter at least one type of charge. Therefore a large tick will appear if some charge information has been entered but individual charges are shown.

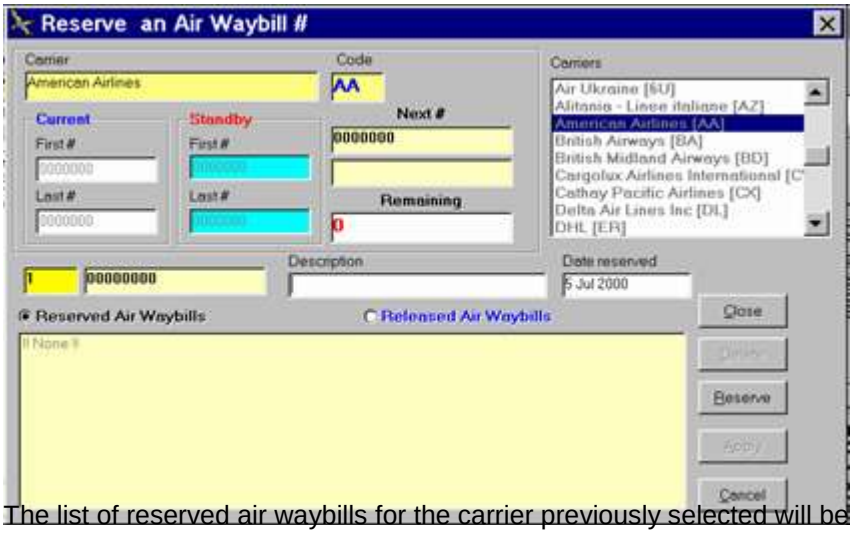


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IATA Air Freight - Continued

IATA/Neutral Air Waybill Number Allocation

For IATA/Neutral Air Waybills clicking the Air Waybill Serial number box will bring up the next screen as follows:

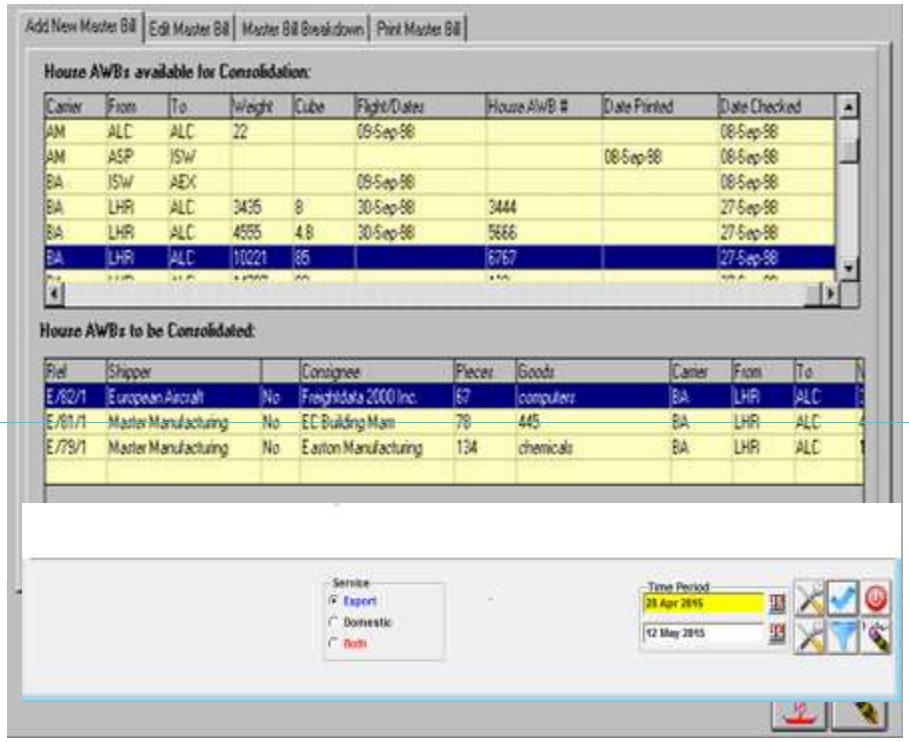


The list of reserved air waybills for the carrier previously selected will be displayed. The user can now select one of the reserved numbers by clicking on the appropriate item in the list, or the next number can be allocated by pressing the button labelled **Next #**. This will display the next number if there is one.
To make this choice permanent - press the button labelled **Apply** and this will return you to your Air Freight Details and the information will be stored in your Air Waybill number field. The carrier and Air Waybill numbers will now be disabled and you will not be able to change them. At the same time the next available number for this carrier will be updated. If this is the last in the range, the standby range replace the current range and the standby range set to 0.

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IATA Consolidate House Air Waybills

From the Tools menu, choose Consolidate House AWB. To consolidate House AWB ***double click*** the AWB required. The AWB will then be placed in the panel below for consolidation of the AWB. When you have finished click the check box.
To Edit Master Bill, click on the required AWB, which will turn blue - then press the Check button. This will take you to the airfreight details, where you can make required changes. When you have finished click the Check box and return to the Consolidated House AWB section. To see details of the master bill breakdown chose the Master Bill Breakdown tab, then click the required AWB. To print the Master AWB, Click the MAWB and choose the print option.



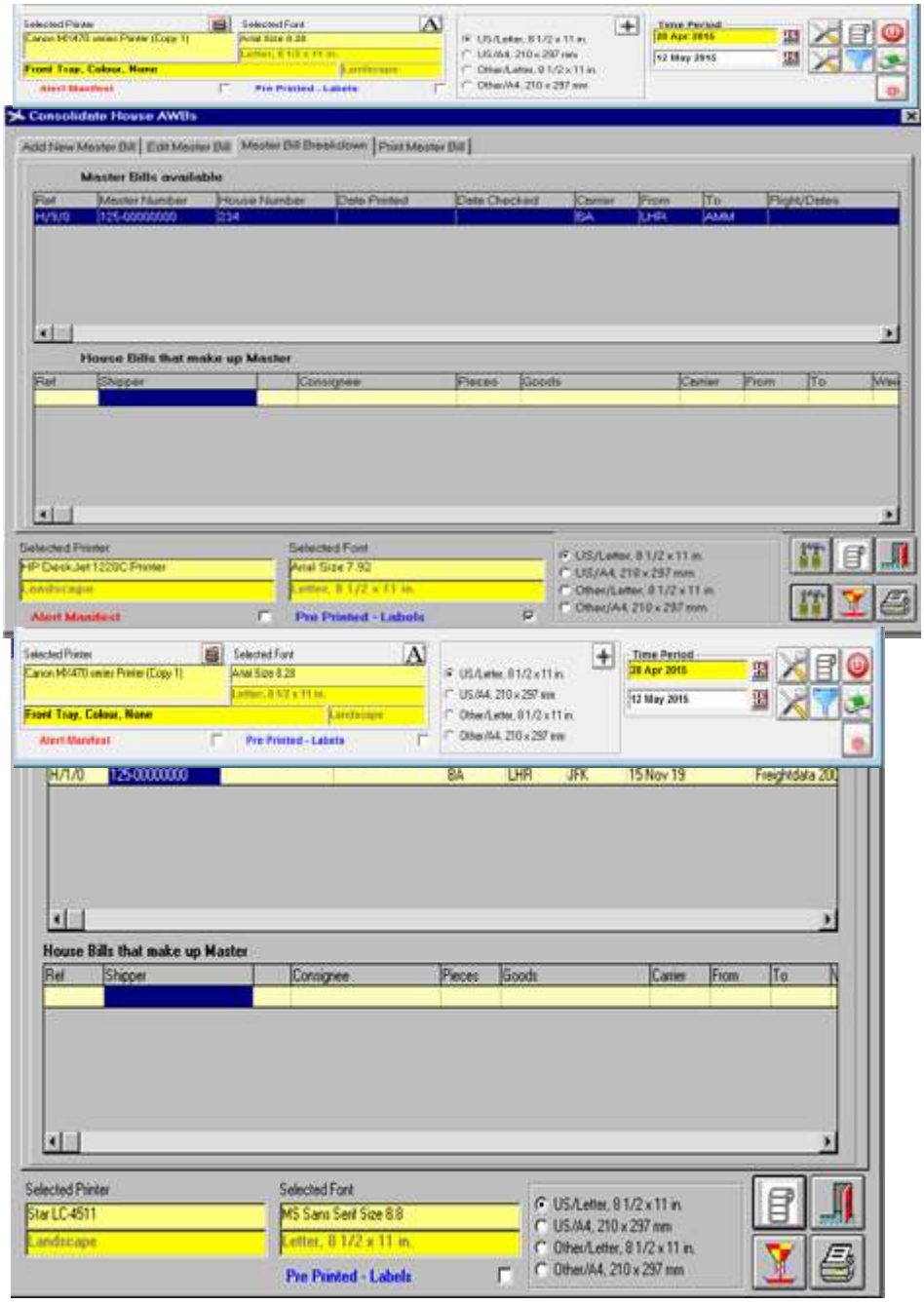
Master Bill Breakdown/Edit Master Bill IATA

This option Tab shows the breakdown of you Master Bill of Lading and the make up of the House Air Waybills. Also in this section is the option tab to access the edit Master Bill. To edit the MAWB check the “ICON”, this will take you directly to the MAWB screen for editing.

The option for size of print including US standards, are available here along with the choice of Printers and Fonts.

You can also access the “Icon” for Printing Labels in this

Files for “MS


Consolidate House AWBs
Add New Master Bill
Edit Master Bill
Master Bill Breakdown
Print Master Bill
Master Bills available
Ref
Master Number
House Number
Date Printed
Date Checked
Carrier
From
To
Flight/Dates
H/1/0
125-00000000
234
BA
LHR
AMM
House Bills that make up Master
Ref
Shipper
Consignee
Pieces
Goods
Carrier
From
To
Selected Printer
HP DeskJet 1220C Printer
Landscape
Selected Font
Arial Size 7.92
Letter, 8 1/2 x 11 in.
Alert Manifest
Pre Printed - Labels
US/Letter, 8 1/2 x 11 in.
US/A4, 210 x 297 mm
Other/Letter, 8 1/2 x 11 in.
Other/A4, 210 x 297 mm
Selected Printer
Canon MX470 series Printer (Copy 1)
Front Tray, Colour, None
Selected Font
Arial Size 8.28
Landscape
Time Period
28 Apr 2015
12 May 2015
H/1/0
125-00000000
BA
LHR
JFK
15 Nov 19
Freightdata 200
House Bills that make up Master
Ref
Shipper
Consignee
Pieces
Goods
Carrier
From
To
Selected Printer
Star LC-4511
Landscape
Selected Font
MS Sans Serif Size 8.8
Letter, 8 1/2 x 11 in.
Pre Printed - Labels
US/Letter, 8 1/2 x 11 in.
US/A4, 210 x 297 mm
Other/Letter, 8 1/2 x 11 in.
Other/A4, 210 x 297 mm

Freightdata 2000

Consolidate House IATA Air Waybills

Air Waybill Filter

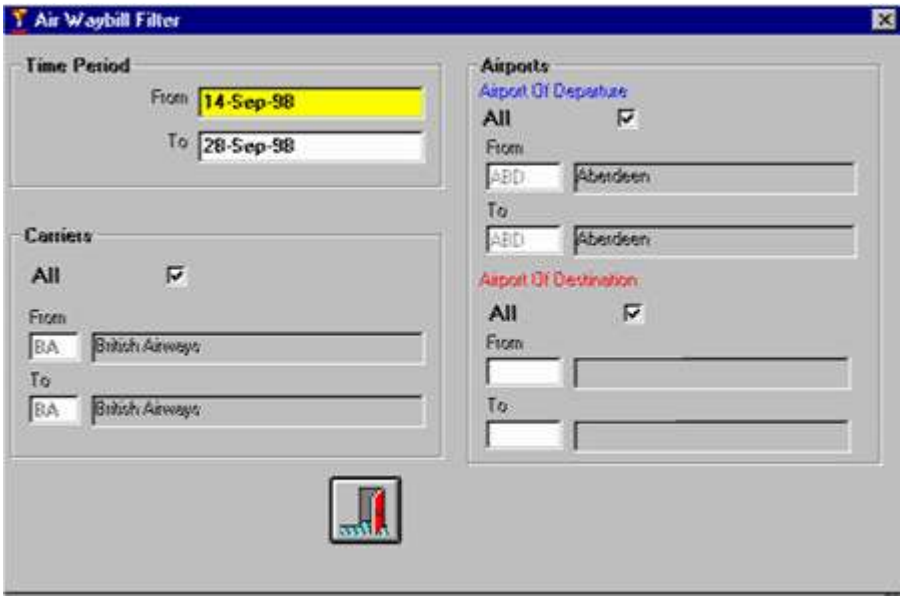
Use this to filter Air Waybills displayed. The date range will default to the last 2 weeks on entering the Consolidate screen. Other options will default to the last chosen. The first time, these will be set to All Carriers from All Departure Airports to All Destination Airports. Click on the date fields to bring up a calendar. You can enter ranges for Carriers or Airports, or you can enter the same code in the From and To boxes to denote a single Carrier or Airport. In the example shown, if the All box in the Carrier frame was not checked, this would denote just British Airways as a Carrier. With the box checked it denotes all Carriers.

Printing Air Waybills

To change the paper length, printer or printer characteristics in Freightdata, you simply have to double click on the Printer Name or Paper size displayed on the Print screens in Freightdata. EG: In the Print menu - documents screen these are at the top of the screen above the documents list. In the Master Air Waybill screen these appear at the bottom of the screen.

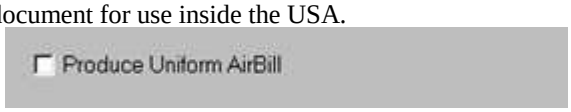
Licensed Material

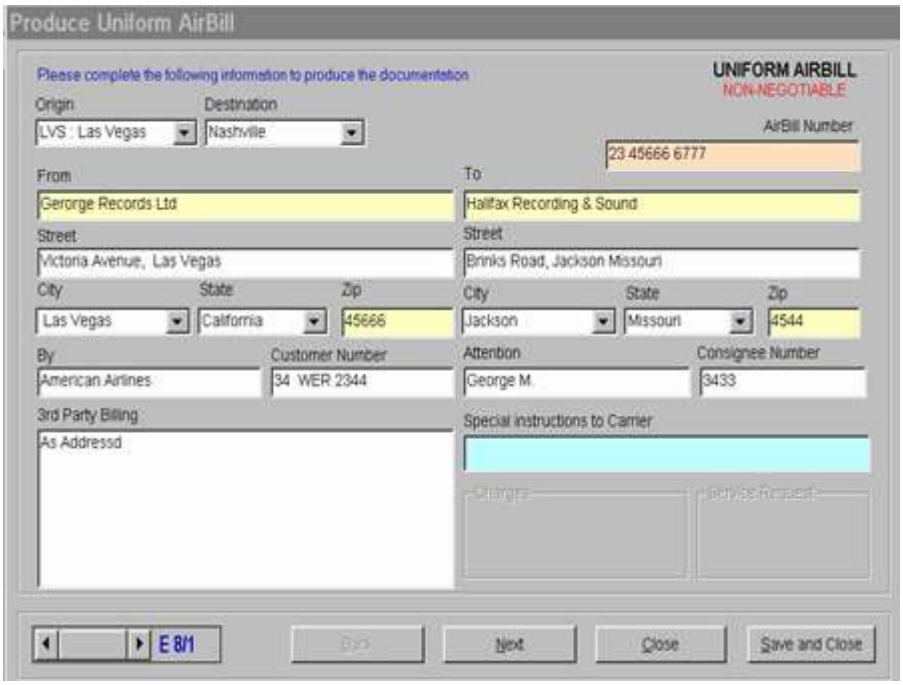



Air Waybill Filter
Time Period
From
14-Sep-98
To
28-Sep-98
Carriers
All
From
BA
British Airways
To
BA
British Airways
Airports
Airport Of Departure
All
From
ABD
Aberdeen
To
ABD
Aberdeen
Airport Of Destination
All
From
To

USA Uniform Domestic Air Waybill

This document is not to be confused with the International IATA Air Waybill. Its purpose is for domestic use only and is not legally recognised outside the U.S.A.
Although you can use the standard IATA Air Waybill for internal use in the states this Uniform Domestic Air waybill is an excellent document for use inside the USA.

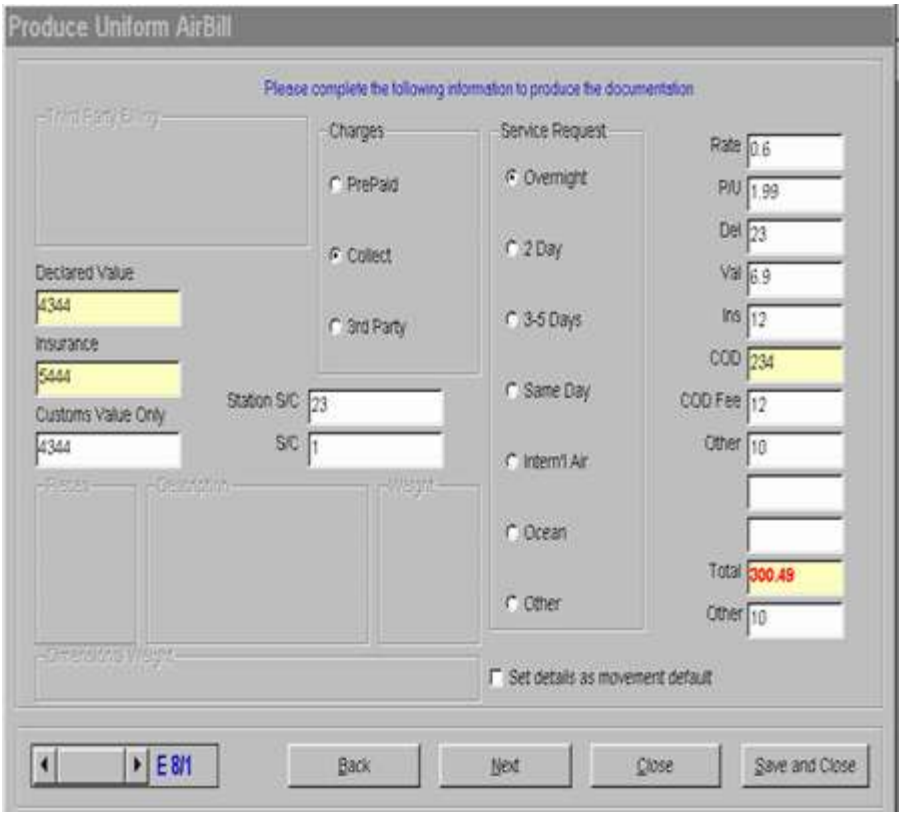




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USA Uniform Domestic Air Waybill…Continued

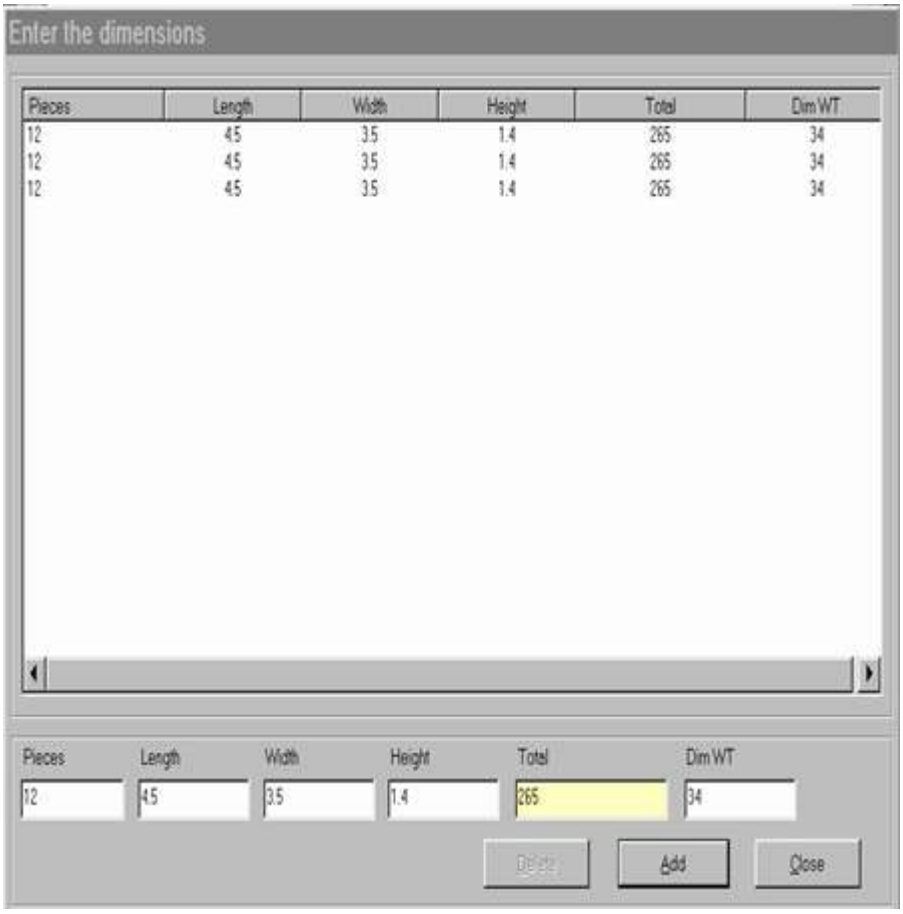
The next button produces the accounting information for the domestic Air Waybill. As each item is added the items are automatically calculated



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USA Uniform Domestic Air Waybill.. Continued

Dimensions Calculculator



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Customs UK

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Customs UK (NES & NCTS)



Accessed via the Edit Menu by Clicking on the Customs Menu Item.

Firstly, it is expected that the user has some basic knowledge of Customs documentation. However, we have provided some general guide lines to help in completion of the Customs forms in the EEC. United States and other countries should refer to relevant documents and Customs departments.
For Exports, the 5 check boxes on the General tab control this information. The combination of checked boxes decides the Declaration Codes available. The VAT Number entered is that of the first address on the SAD. The Offices tab allows entry of up to 6 Transit Offices and country codes and, Destination Office and Code.

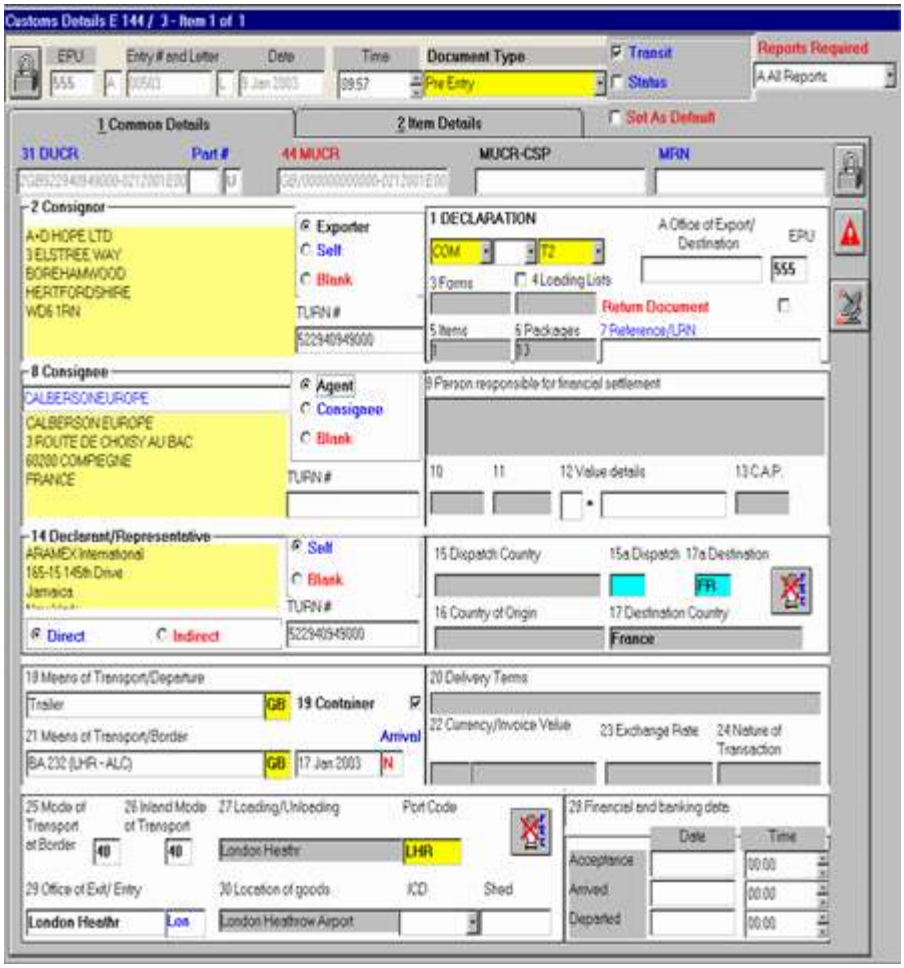
The Customs box is also available via the F5 key and the Customs button  on the toolbar. Once the button has been pressed, a tick will appear on the button to show that, that section has been filled in. 

Note: If the following display occurs "There is no Customs Information to Print"
This will mean that you have not completed the ***Customs*** information correctly.
Re-Check the information you have entered.

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Customs UK (NES & NCTS) Customs - Continued….

For Example: Typical EEC SAD Completion.



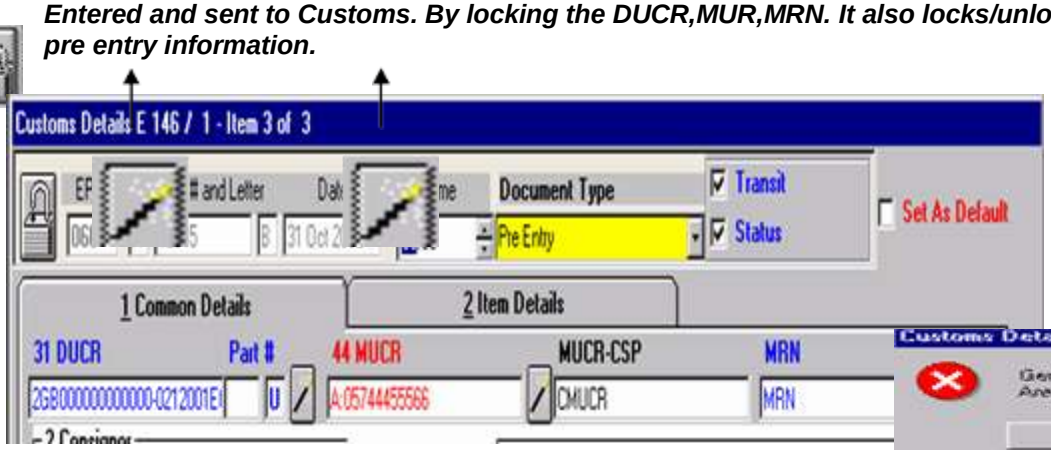
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Customs UK (NES & NCTS) Customs - Continued….

Note: The information below is only a guide and** should not to be relied on: You should obtain Customs notices and advice by contacting your local **HMC office for information on completion of any Customs documentation.

Locked and unlocked : This option controls the data
Entered and sent to Customs. By locking the DUCR,MUR,MRN. It also locks/unlocks the EPU & pre entry information.





Generates DUCR

GeneratesMUCR

Confirms your request for DUCR or MUCR

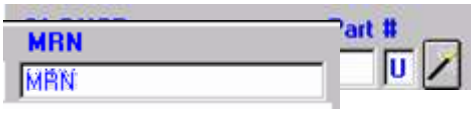


Customs UK (NES & NCTS) Customs - Continued….





DECLARATION The "wand" display when clicked will generate an automatic nu mber for "DUCR". This will be the same for "MUCR" & " **MRN**







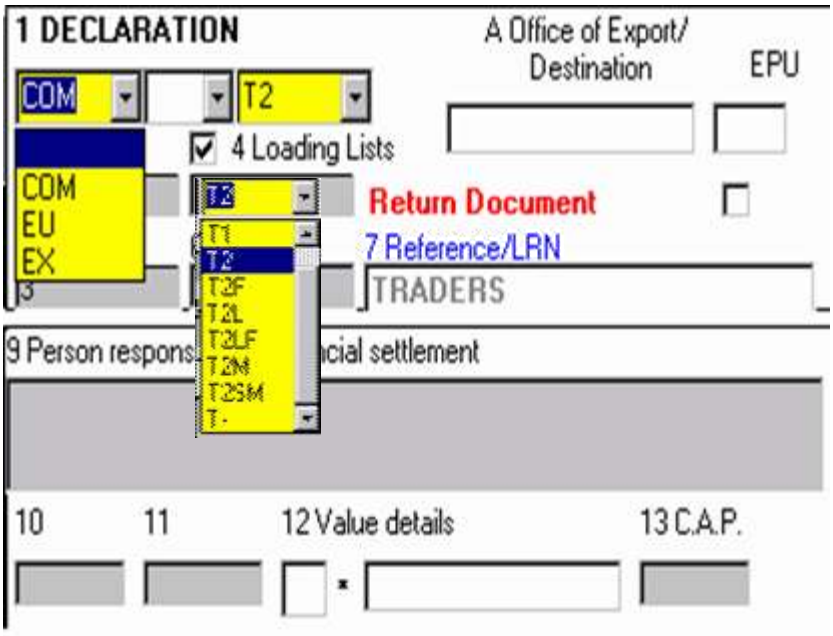
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Set as default will take set items in your SAD and re-apply them in all your new SAD entries. These items will be Declarations/Representitive, Exporter,
Also other items in the declaration such as "Com" and "T2" etc.

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Customs UK (NES & NCTS) Customs - Continued….

DECLARATION: Is completed in the normal way including declaations for "T" forms. A pull down box is provided for "Type of declaration" together with the "T"Form option below.

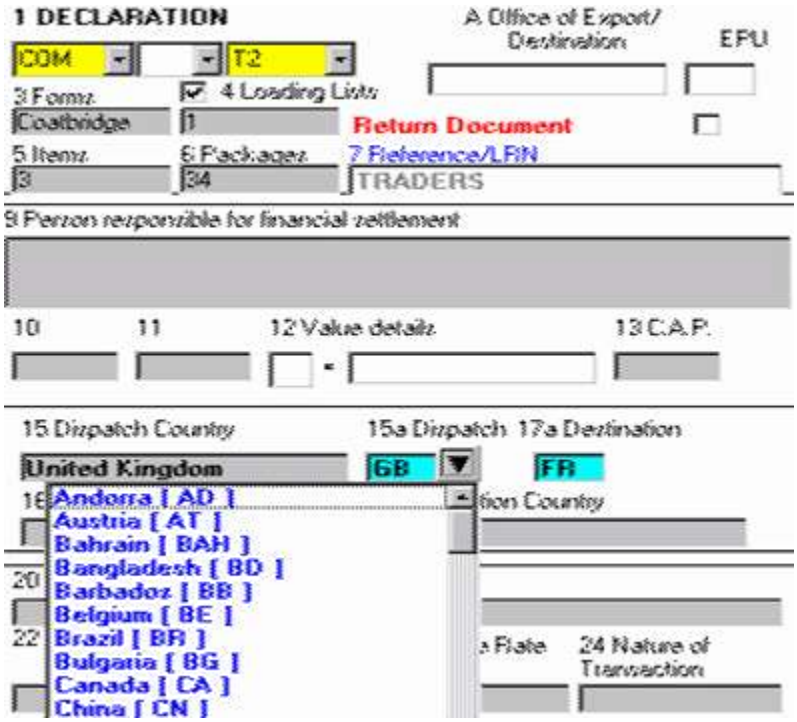


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Customs UK (NES & NCTS) Customs - Continued….

Declaration:

Box 15: Dispatch Country has a pull down box with pre-installed countries from "Places" in the set-up menu of FD2. The same pull down box operates the same way and takes its information also from the "places" option in the set-up menu. (See Paces in Set-Up menu).



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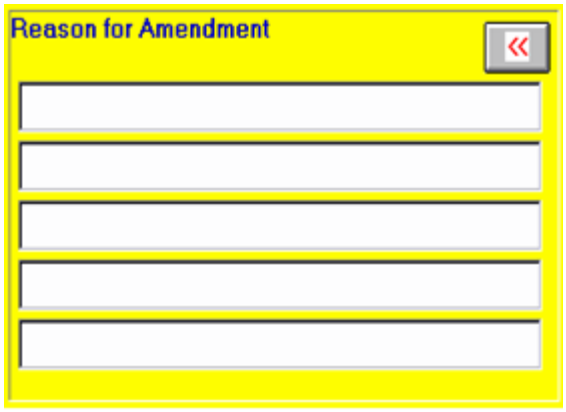
Customs UK (NES & NCTS) Reasons For Amendment

It is a requirement to sometimes amend and provide the reasons to HM Customs. By clicking the “ICON” on the main entry screen below you can detail these amendments.

The radar screen left is accessed for transmission to customs that has its own HELP information. Click the “ICON” to enter transmission services and HELP information services







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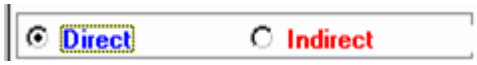
Customs (NES & NCTS) UK Customs - Continued….





By clicking the "Radio Button" in the display opposite you can transfer the different names by title. For example: You can move the agents name into the consignors box. You can also blank out boxes as required.

Box 14 controls for Direct/indirect options are controlled from these boxes here .

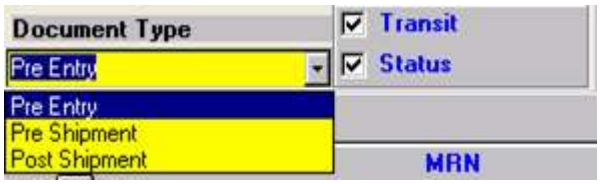


See H.M C&E rules in the use of box 14.

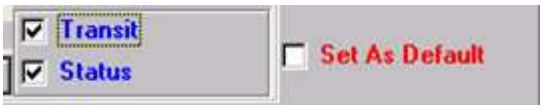
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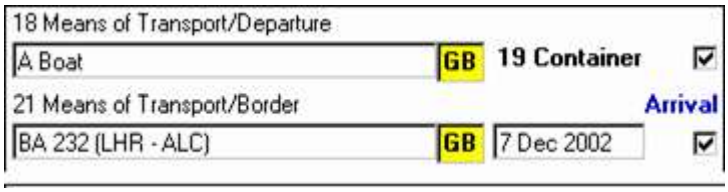
Customs (NES & NCTS) UK Customs - Continued….

PRE-Entry: Is completed with the option of pull down boxes shown here.



Transit Status: This options can be checked and will highlight or display the relevant procedures required by customs.



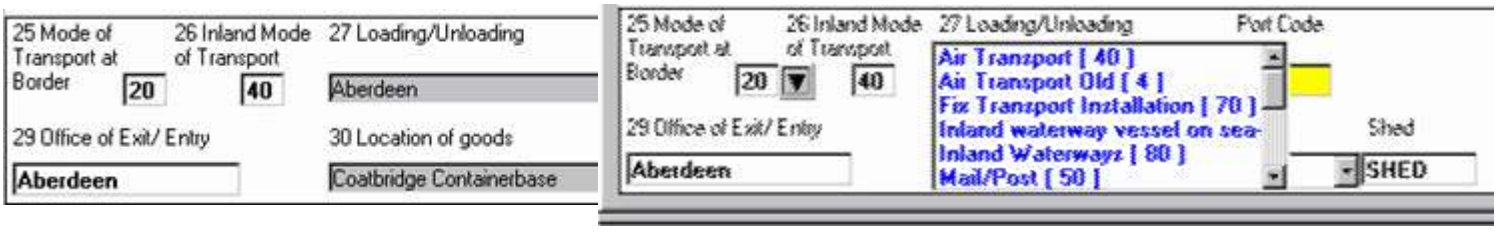


Customs (NES & NCTS) Customs - Continued….

Means of Transport & Departure.

Click the Mode of Transport (25) here ▶ 

You will see the blue display showing "Modes of Transport. Click the arrow to see the description box below.



For Customs Inland mode of transport click the box here ⟶ 



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Customs (NES & NCTS) UK Customs - Continued….

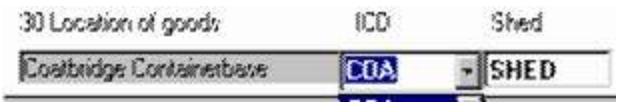


Click Box (27) Loading & Unloading option for the display below.



To complete the options on ICD's click the

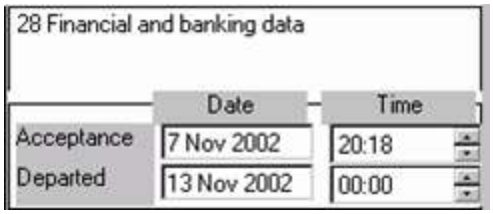




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Customs (NES & NCTS) UK Customs - Continued….

By clicking on the data field below an automatic calendar will appear. Once displayed to close it pick either the same day or the new day required. The "Chevrons" will allow you to change each calendar **month. Below the time can also be set-up by using the pull down arrows.**



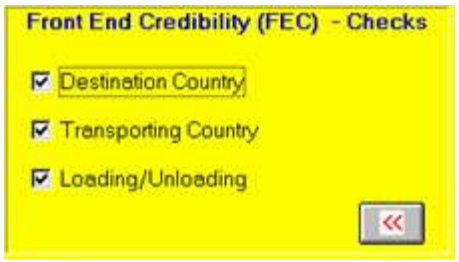


Customs FEC (NES & NCTS) UK Customs

This "Icon" checks the Credibility of the FEC if HM Customs wishes to verify Destination Country, Transport Country and Loading/Unloading.

By clicking on each heading you confirm to customs that this information is correct. When you have clicked the appropriate boxes click the "Chevron" below.



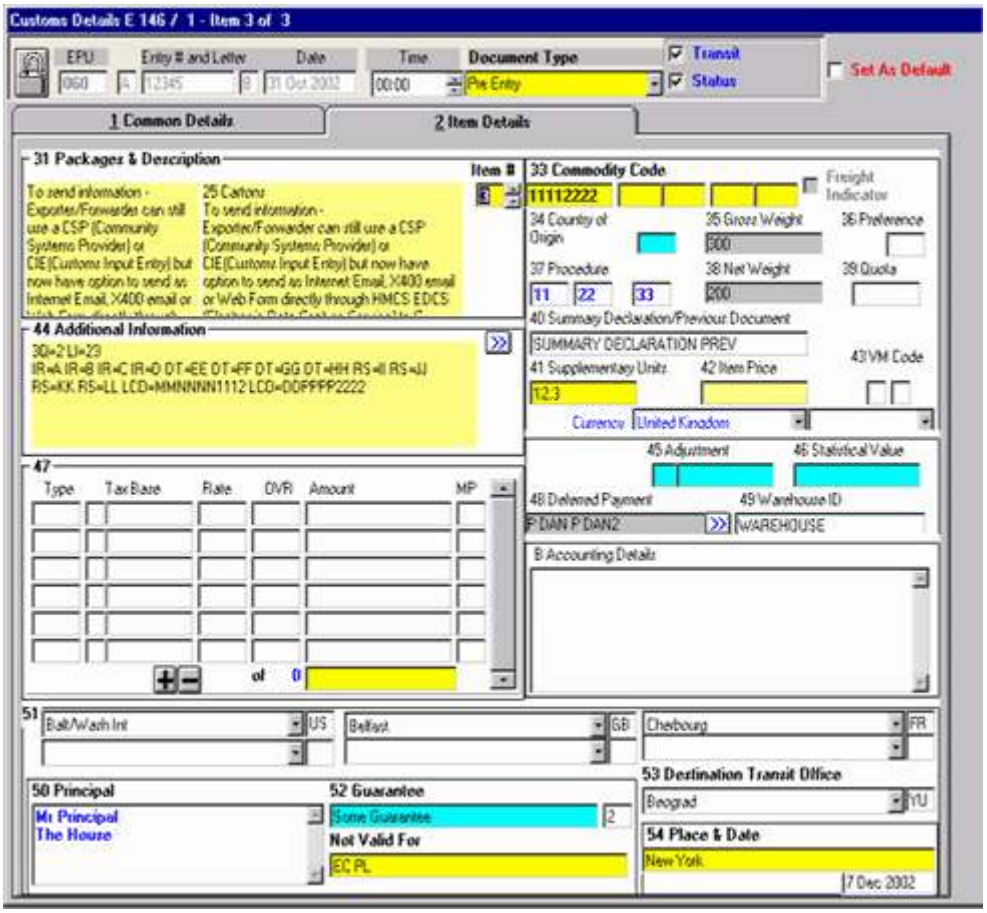


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Customs (NES & NCTS) UK Customs - Continued….Item Details

For Example: Typical EEC SAD Completion.

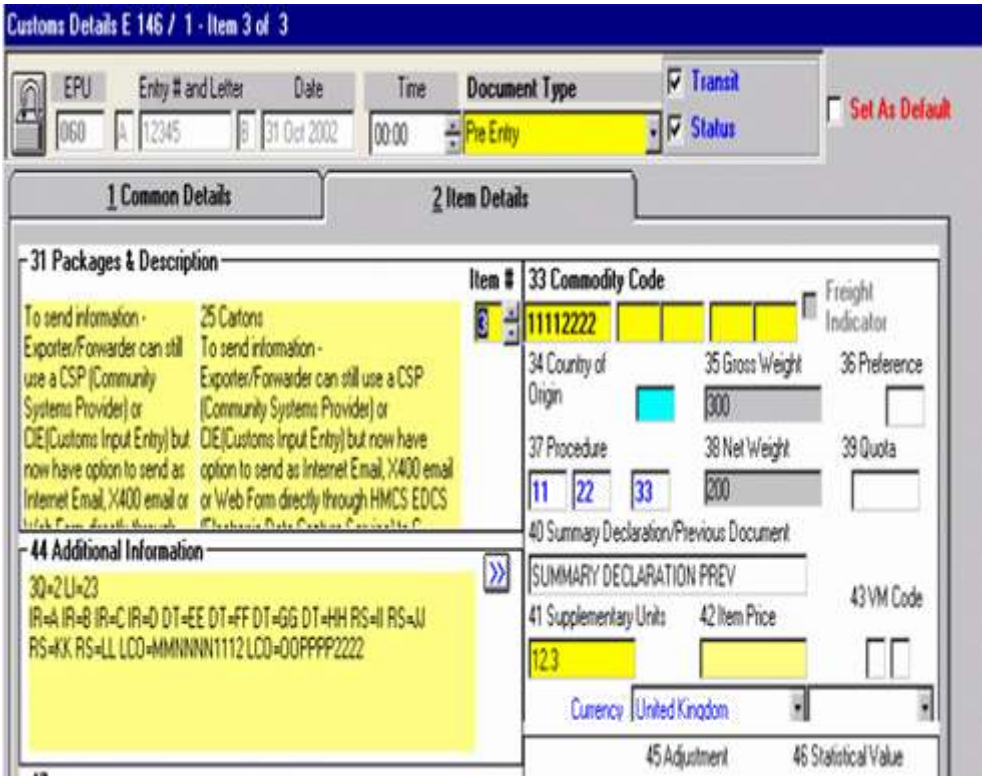
Items detail "Tab".



Customs (NES & NCTS) UK Customs - Continued…. Item Details

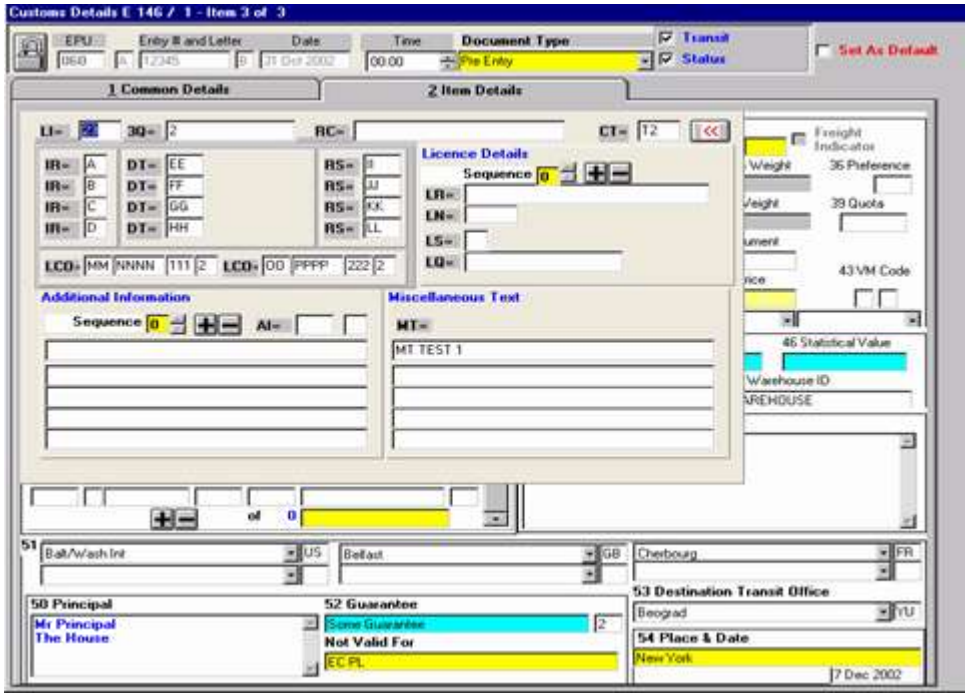
Completion from the main "Cargo details" of FD2 will automatically compile the "Item Details as shown here. This will however exclude some of the Community procedures.

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Customs (NES & NCTS) UK Customs - Continued…. Item Details

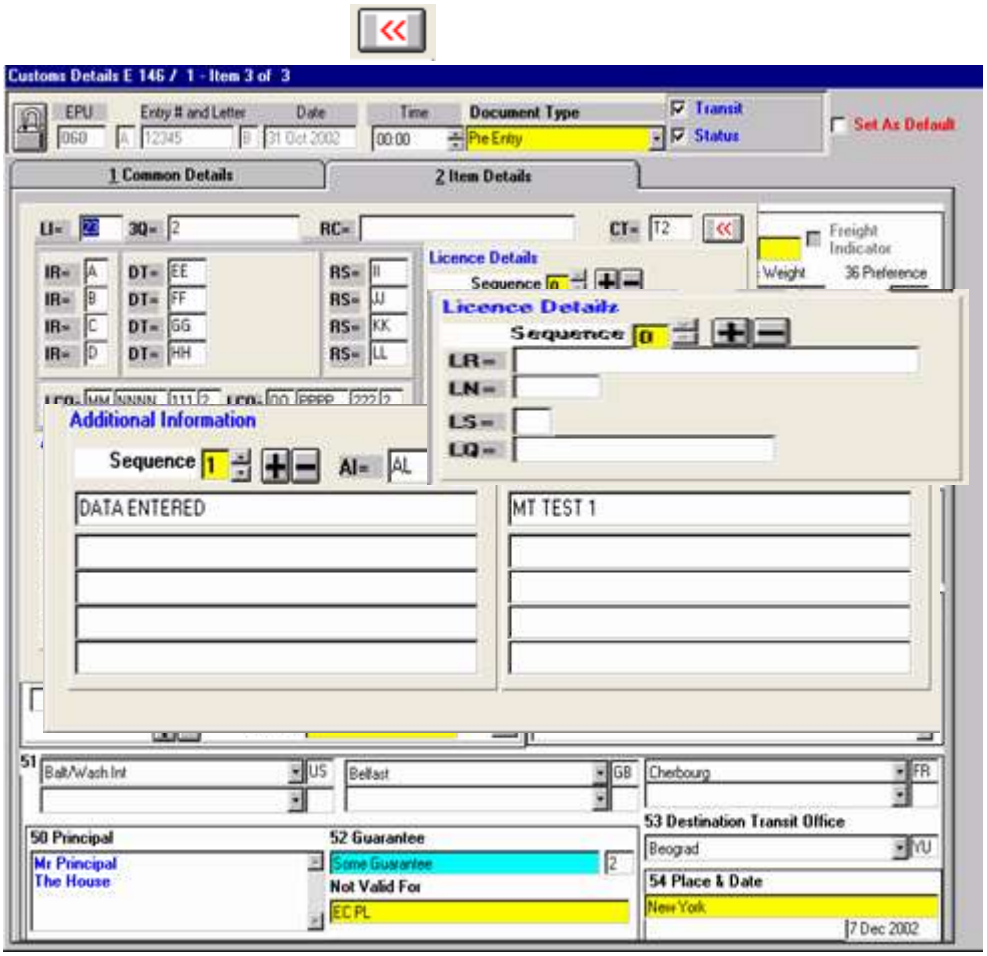


Using the chevron here you can access the additional information data as shown here.

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Customs (NES & NCTS) UK Customs - Continued…. Item Details

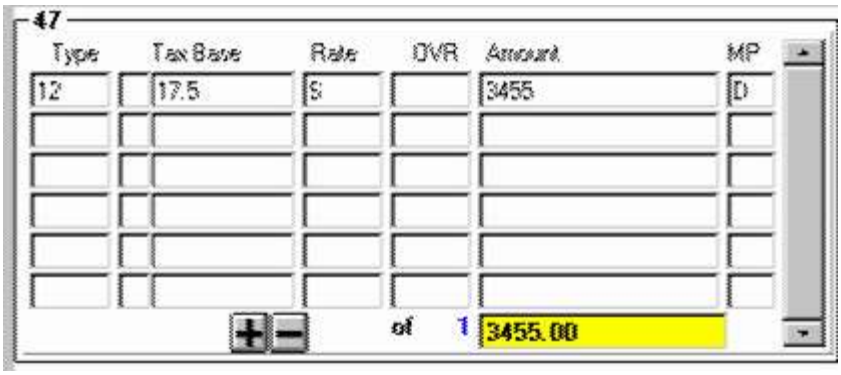
You can use the "+" or" "-" boxes to expand the sequence numbers as required. When you have completed this section click the chevron here to return to the main SAD screen,



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Customs (NES & NCTS) UK Customs - Continued…. Item Details

Box 47





Using the "+" & "-" options shown here you can increase the number of items listed. The BAR (Left) allows the display of all the items



listed by using the "UP2 or "Down" arrows.

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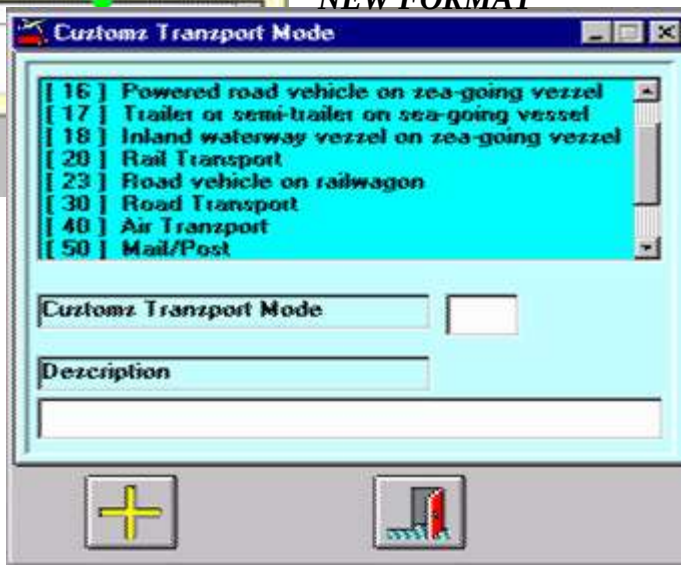
Customs Transport Modes Older versions

Earlier revisions of FD2 issued before the European Customs changes @27/11/02, required single identification modes such as **1= Sea Transport** as shown in the example below. Owing to the new NES & NCTS changes it is now necessary to alter this older format to the new Customs codes. Information on these codes can be obtained from your local Customs office. However, the example here, shows some of the current format, when this guide was produced. ***Failure to implement these changes may cause your customs documents to be rejected***.

OLD FORMAT



NEW FORMAT



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USA Customs

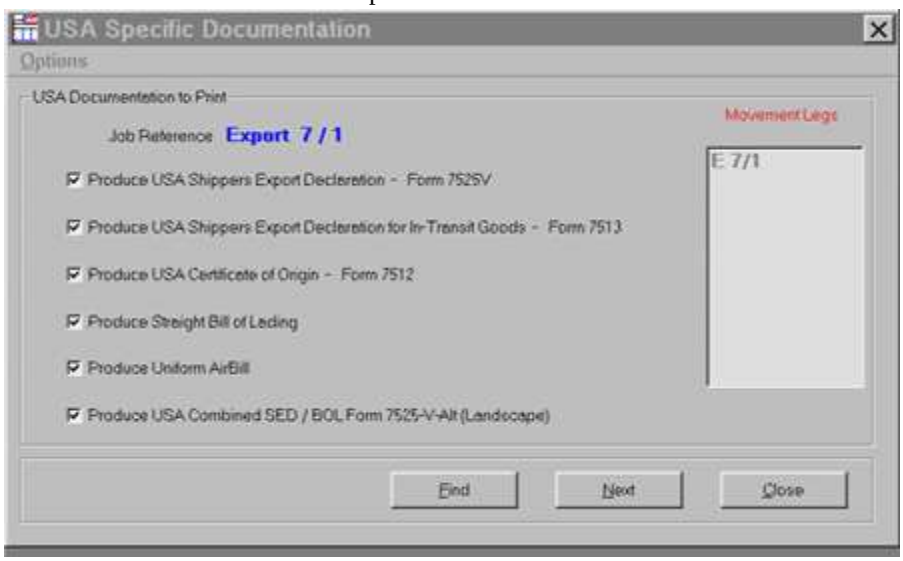
Customs - SED Documentation

Accessed via the Edit Menu by Clicking on the Customs Menu Item.

Firstly, it is expected that the user has some basic knowledge of Customs documentation. However, we have provided some general guide lines to help in completion of the Customs forms.

The Customs box is also available via the F5 key and the Customs button  on the toolbar. Once the button has been pressed, a tick will appear on the button to show that, that section has been filled in. 

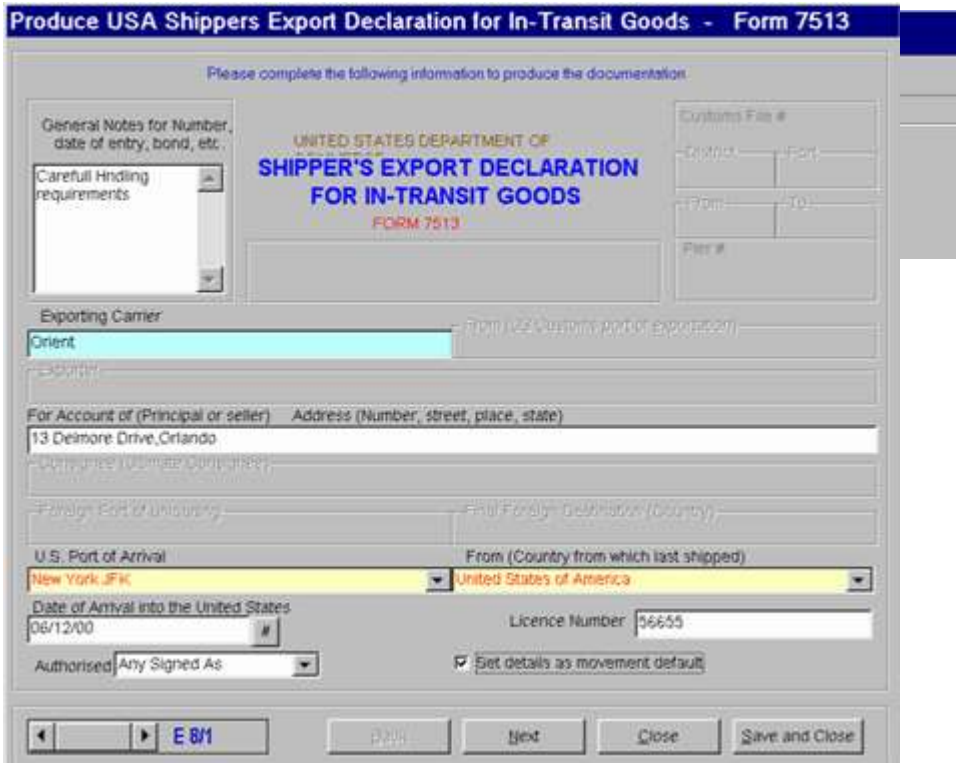
Click the Next button and we will proceed to the first item SAD –Form 7525V



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US Shipment Export declaration

Note: The information below is only a guide and *should not to be relied on: You should obtain Customs notices and advice by contacting your local U.S.* ***Customs 0ffice for information on completion of any Customs documentation.***



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US Shipment Export declaration

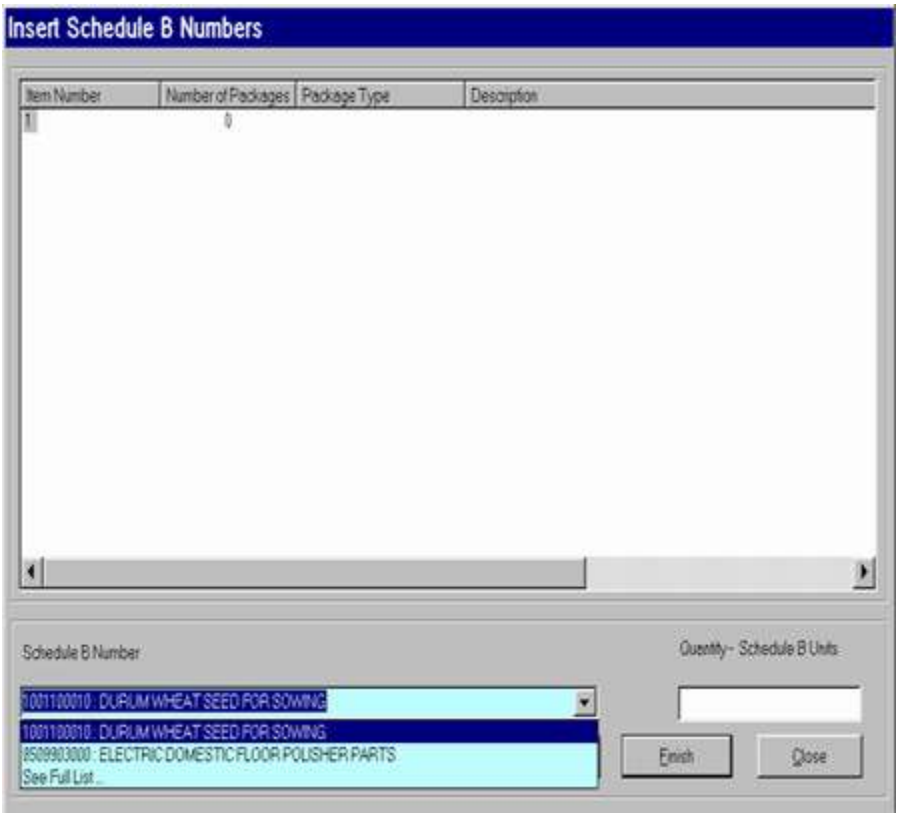
Next you will be able to enter ant schedule “B” you wish to enter.
This can activated by clicking the ***“Change”*** button on the bottom right of the display. You can hold, Go Back and Save at this point or print the item if you wish.



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US Shipment Export declaration

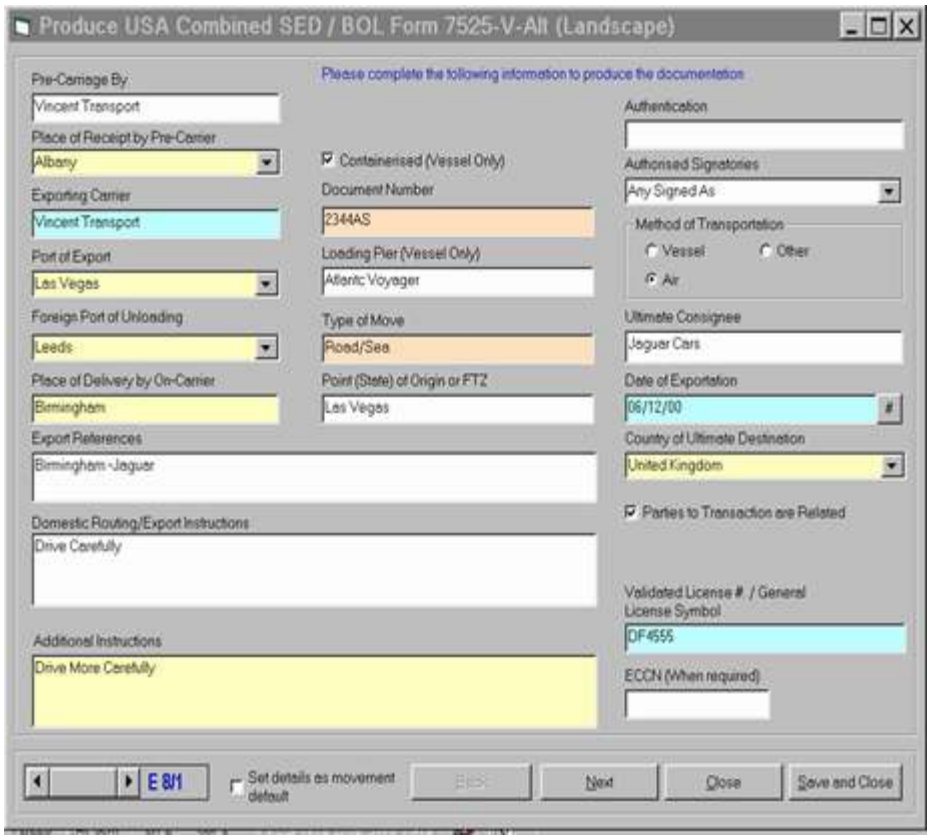
From the pull down list on the schedule “B” numbers you have a complete list of schedule types to enter automatically. Finish will complete the export SED.



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USA Customs Optional Landscape SED





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SED 7525V

The next document option is the SED 7525V
Use the pull down boxes to pick your required data.

Schedule “B” documents can be accessed again in the same way as the first option for the SED, by clicking the next button then clicking the change option.





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Printing and Faxing & Email

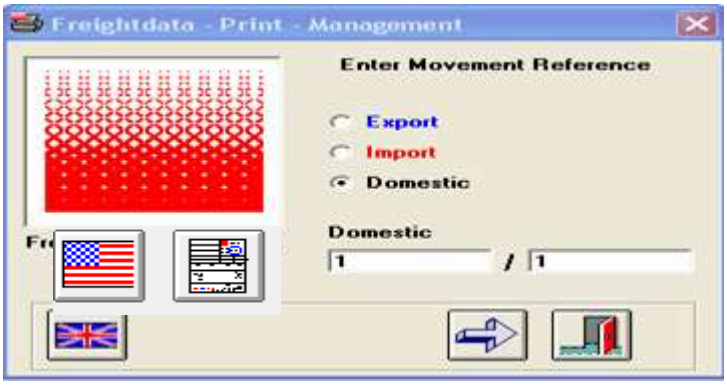
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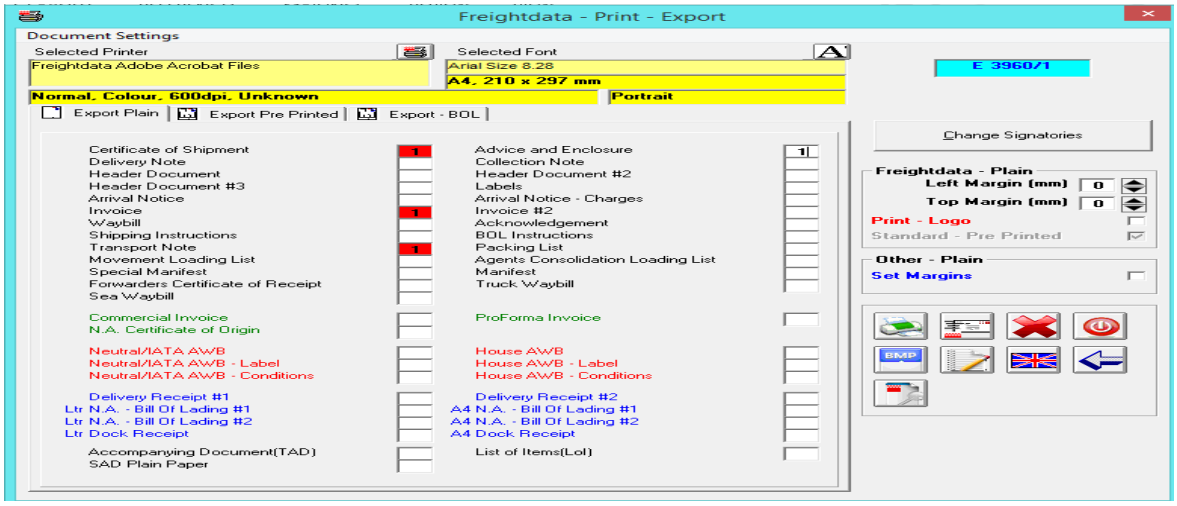
Selecting a Plain Domestic Document

To print a Domestic Plain document, that is a document that is used for non - international movements, click on the Domestic option button as shown then enter in a Movement Number and a Position Number and click on the Next button.

For Groupage (Consolidation) prints leave the Position box empty.
To select a Plain Document, click on the Domestic Plain tab as shown to reveal all the Domestic Plain documents available.

Enter into the box beside each document the number of copies of that document that you want to print. The printer type and font style and size may be adjusted by clicking on the yellow boxes. Once you have selected all of the documents that you want to print click on the Print button. To print a Domestic Pre Printed document click on the Domestic option button shown. The enter in a movement Number and click on the consolidation prints leave box empty available for printing

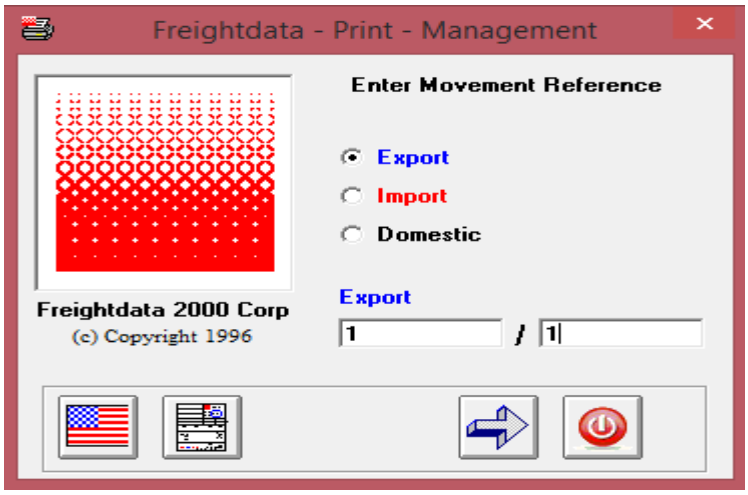




To select a Pre Printed Document click on the Domestic Pre Printed tab as shown to reveal all the Domestic Pre Printed documents

Enter into the box beside each document the number of copies of that document that you want to print. Once you have selected all of the documents that you want to print, click on the print button. Again, printer and font may be selected by clicking on the yellow boxes.

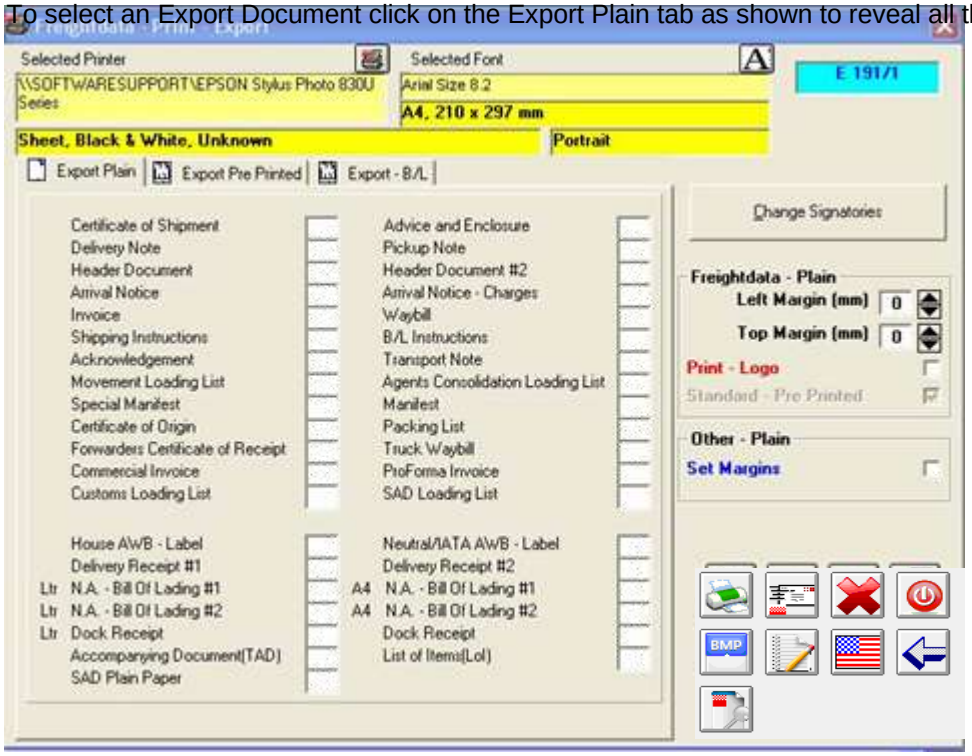
Selecting a Plain Export Document



To print an Export Plain document, that is a document that is used for Export movements, click on the Export option button as shown then enter in a Movement Number and a Position Number and click on the Next button.

For consolidation prints leave the Position box empty.

To select an Export Document click on the Export Plain tab as shown to reveal all the Export Plain documents available for printing.

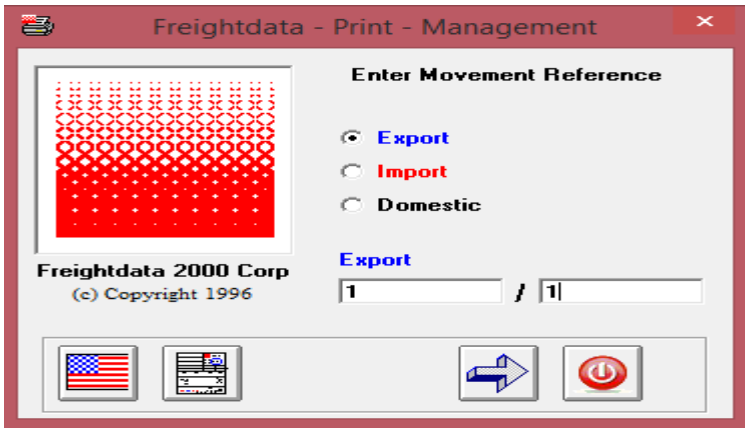


Enter into the box beside each document, the number of copies of that document that you want to print. Select printer type and font by clicking on the yellow boxes. Once you have selected all of the documents that you want to print click on the Print button.

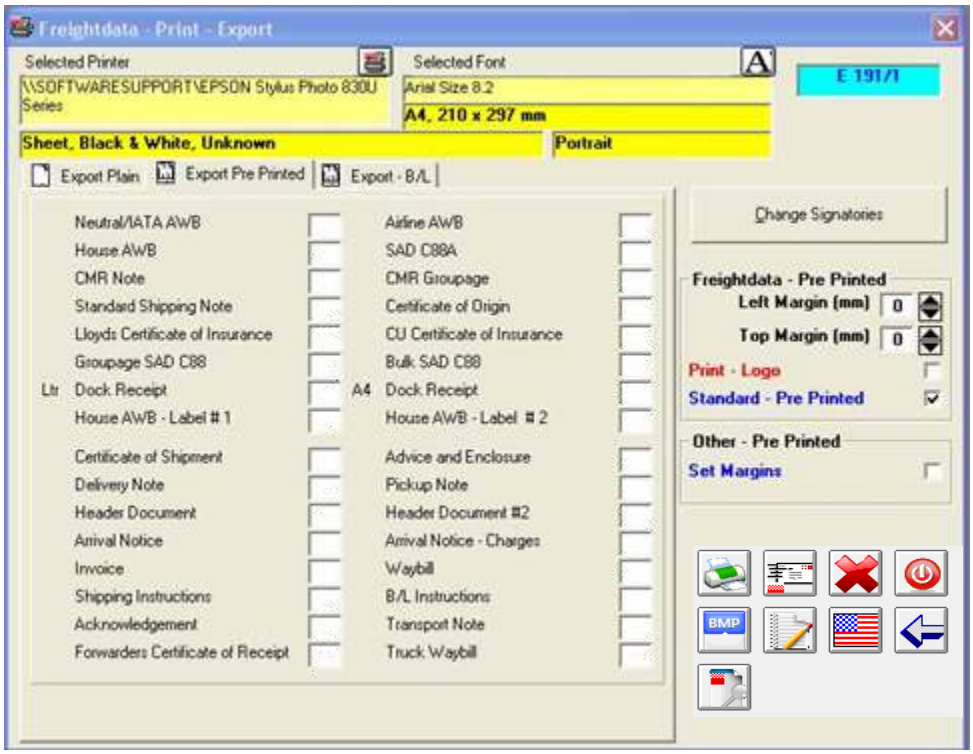
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Selecting a Pre Printed Export Document

To print an Export Pre Printed document, that is a document that is used for Export movements, click on the Export option button as shown then enter in a Movement Number and a Position Number and click on the Next button. For consolidation prints leave the Position box empty.



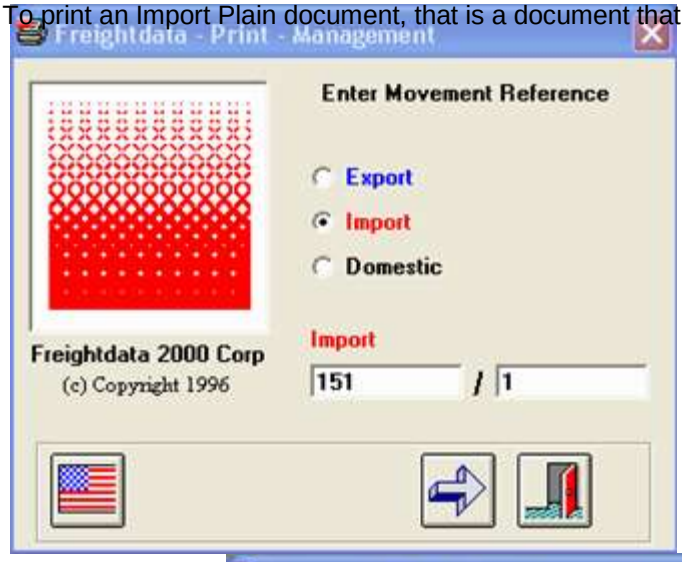
To select a Pre Printed document click on the Export Pre Printed tab as shown to reveal all the Export Pre Printed documents available for printing.
Enter into the box beside each document the number of copies of that document that you want to print, click on the yellow boxes to select printer and font type. Once you have selected all of the documents that you want to print click on the print button.



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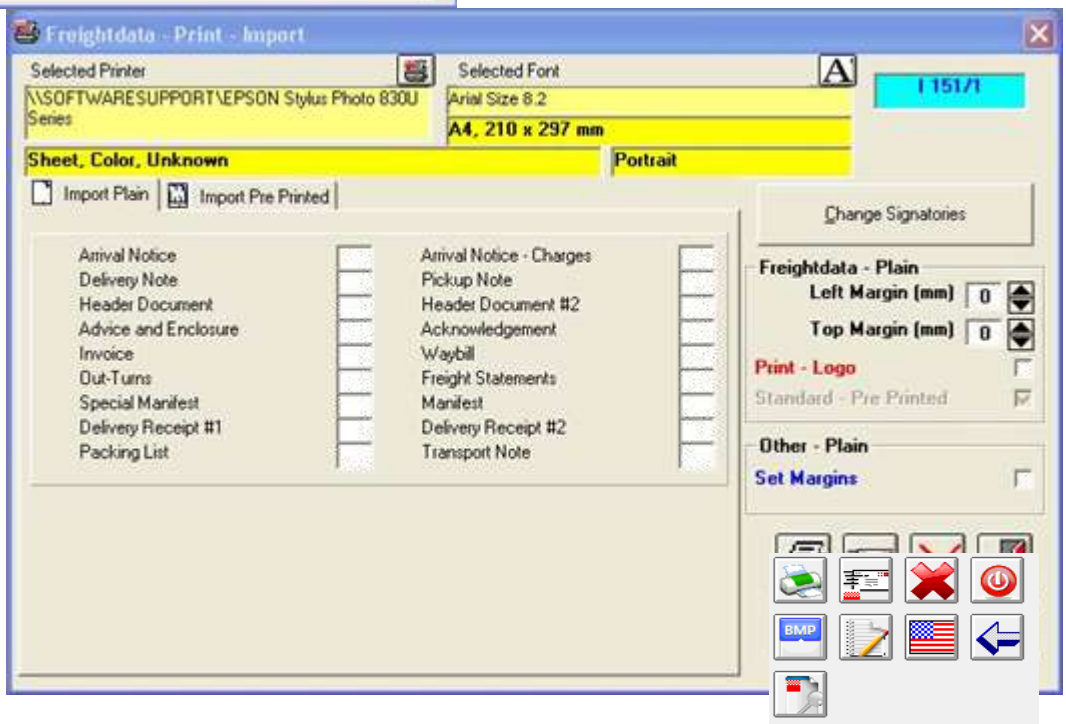
Selecting a Plain Import Document

To print an Import Plain document, that is a document that is used for Import movements, click on the Import option button as shown then enter in a Movement Number and a Position Number and click on the Next button. For consolidation prints leave the Position box empty.



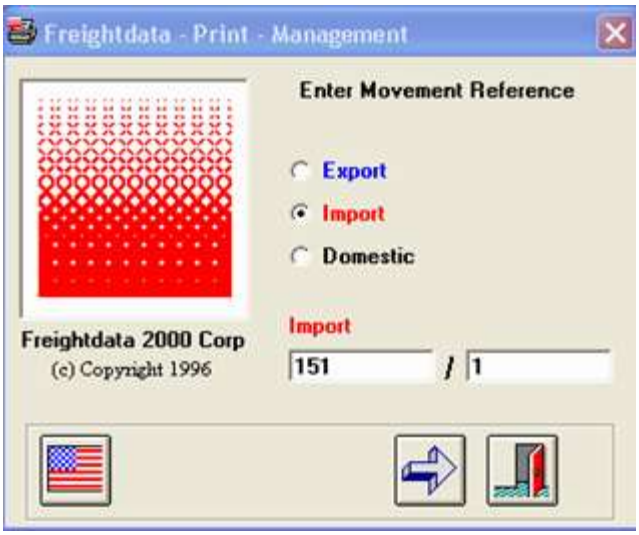
To select an Import Document click on the Import Plain tab as shown to reveal all the Import Plain documents available for printing.

Enter into the box beside each document the number of copies of that document that you want to print and select printer and font by clicking on the yellow boxes. Once you have selected all of the documents that you want to print click on the Print button. Either choose your normal printer all click email to attached via ADOBE your document, then just send as an attachment in the normal way.



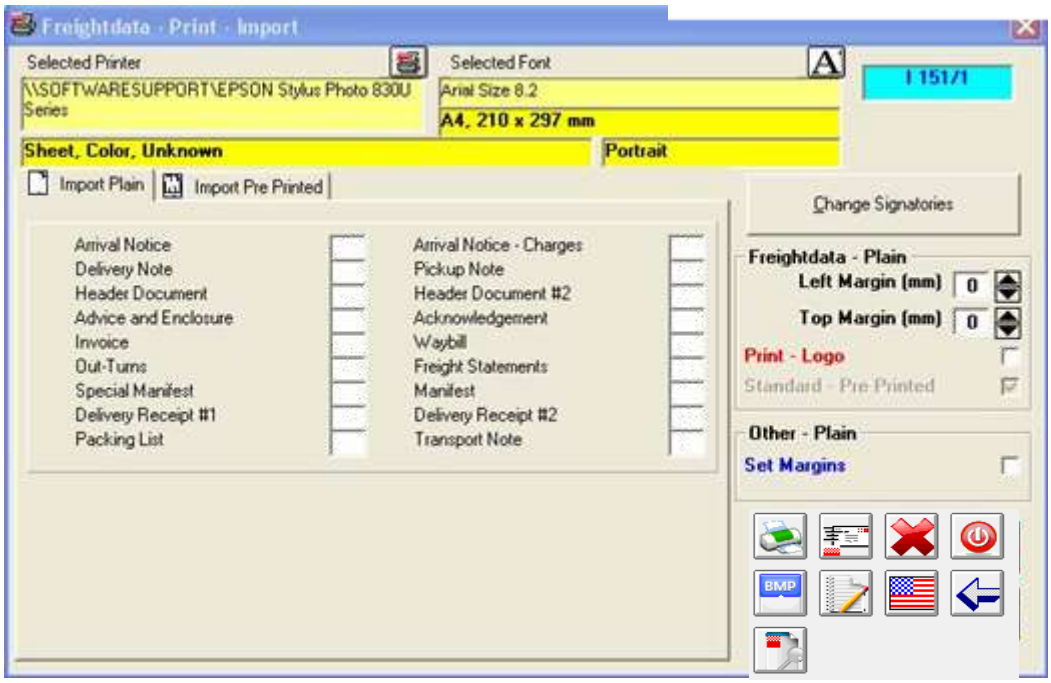
Licensed Material
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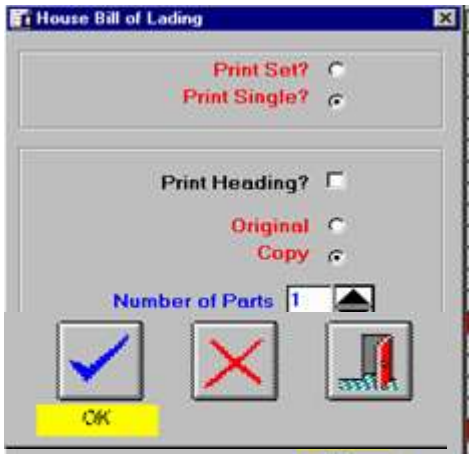
Selecting a Pre Printed Import Document



To print an Import Pre Printed document, that is a document that is used for Import movements, click on the Import option button as shown then enter in a Movement Number and a Position Number and click on the Next button. For consolidation prints leave the Position box empty.

To select a Pre Printed Document click on the Import Pre Printed tab as shown below to reveal all the Import Pre Printed documents available for printing. As with both Plain and Pre Printed documents, the display shows "RED" in the Number box. This confirms that the document has been selected for printing.
The printer and font may be selected by clicking on the relevant yellow boxes.





Bill of Lading print 2nd Option is shown providing a choice from single sets to multiple bills.
***Display shows Pre Printed documents. Items highlighted show alternative to plain documents. (See Alternative to Plain* Documents)**
Click OK to print House Bill



The Margin option below allows print adjustment to Margins on printed documents and for Faxes that require adjustment, owing to different FAX drivers.

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Certificate of Origin



When an entry is made in the Certificate of Origin number of copies box a new form is displayed giving options on printing the Company Details at the bottom of the form. It will always default to NO Details printed.
It the box is checked to print Company details then further options are available to print on all copies or just the final one. IE If 3 Copies are requested the Company Details will only print on the Third copy.

Reset Button The Reset button resets all the 'Number of Copies' boxes to zero, but only for the boxes visible on the form.
For Example: If you had boxes filled in on the Import Plain Documents and the Import Pre Printed documents and only the Pre Printed documents were visible, then only the Pre Printed document boxes will be reset.
Print Set-up Button The Print Set-up Button is used when you want to select another printer, other then the default printer, for printing your documents. To change the Print set-up you must first select a document for printing, you can then process the changes required.
Print Button: The Print Button is used when you want to print your documents using the default printer defined in Windows.
<Back Button The Back Button is used to go back to the Reference Box. This will then enable you to enter in another Reference for Printing.
Close Button The Close button on the Reference box ends the Print Program.
SAD's SAD's printed using a Pre Printed document requires a different form to be used for printing continuous sheets. When this is the case, before printing the continuous sheets a Print box will appear. This will give you time to either change the paper in the current printer or select a different printer for printing the continuous sheets.

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USA Certificate of Origin

For USA documents requiring a Certificate of Origin remember to use the “US” Documents option in Freightdata.





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Alternative to Plain Documents

The Documents listed below are available as Plain Documents and Pre Printed documents.

Collection Note

Waybill

There are two Pre Printed forms available for printing these documents, one form prints the Invoice and the other form prints all the other documents. The layout of the forms is shown on the next page. There are two formats, the Standard 8.5in x 12 in (German Fan Fold) or the Special 11 in x 10 in.
Plain paper prints can also have your LOGO printed. The file pathname must be entered in the Database form and must be a valid Bitmap file no greater than 9 cm x 6 cm. All print screens offer the choice of printing the Logo and which type of Pre-printed forms to use.

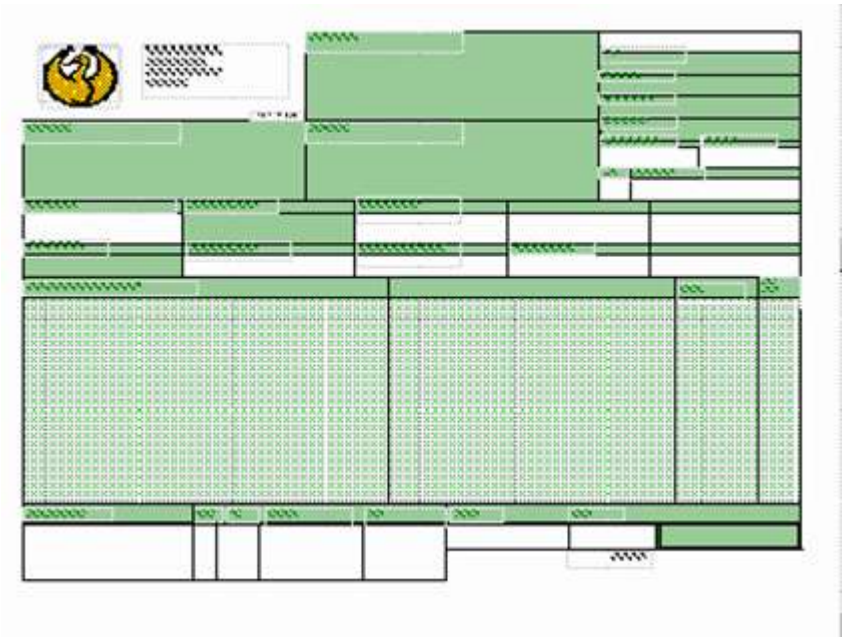


FD2 - Bill & Insure Packs

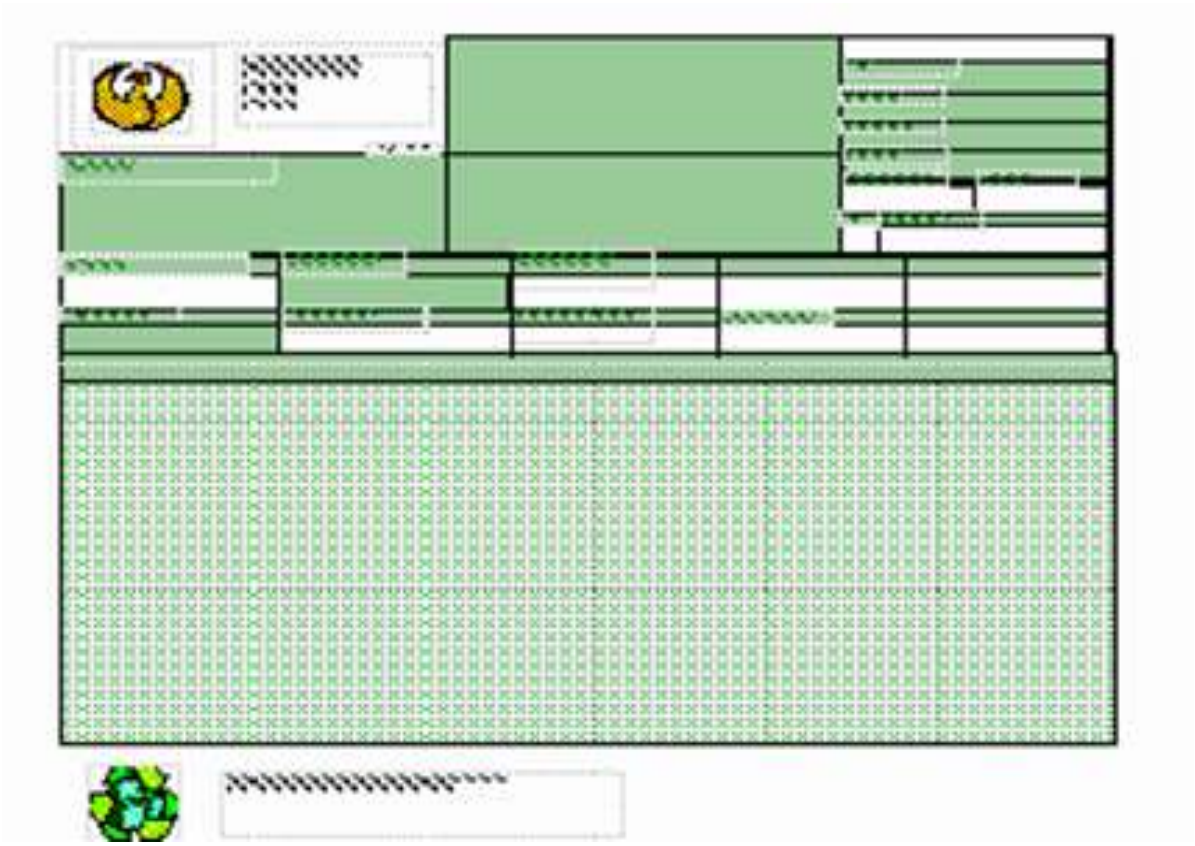
Freightdata offers a software pack for ***Bill of Lading*** that covers most Shipping lines, together with an additional pack for ***Insurance*** prints.

Contact your Dealer to discuss these requirements. Or alternatively contact Freightdata 2000 information provided on the opening page of your manual, or visit our INTERNET Web Site at http://www.freightdata.com.

Pre Printed Invoice form



Freightdata 2000

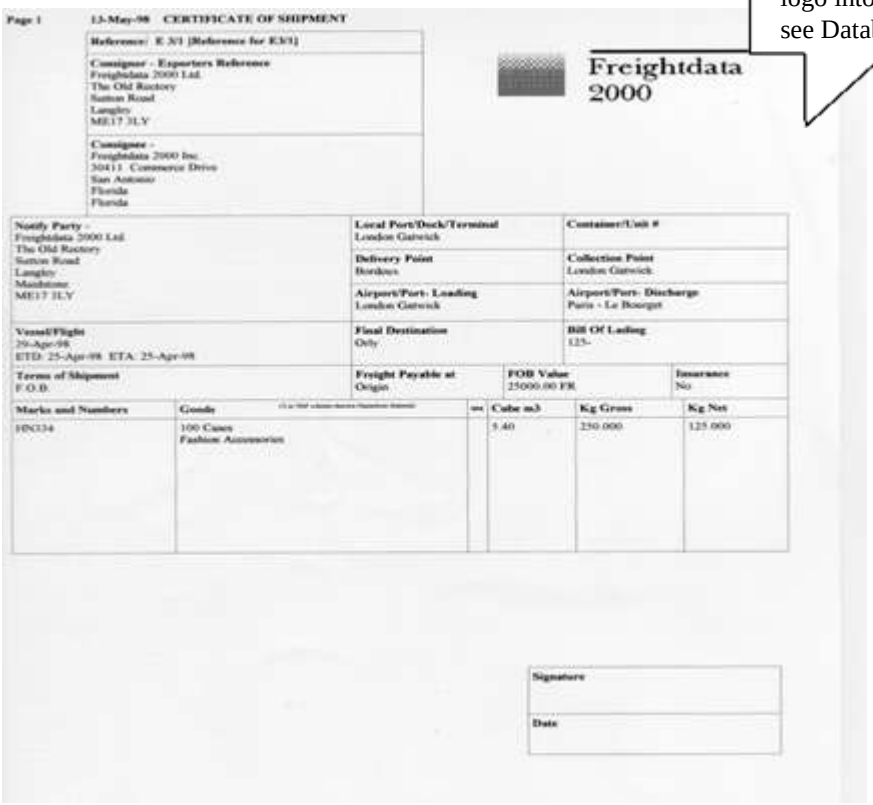


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Plain Paper or Pre Printed Alternative

You may wish to have your outside-printer, print your terms & conditions on the reverse side etc, together with all the lines and boxes the computer will draw for you. All documents can be printed in this format in single or continuos stationery and the program will draw the required document onto this format. The advantages are that you will not need to change stationery. This option prints the ancillary sheet as well as the pre-printed stationery.
This design is ♥Copyright Freightdata 2000.

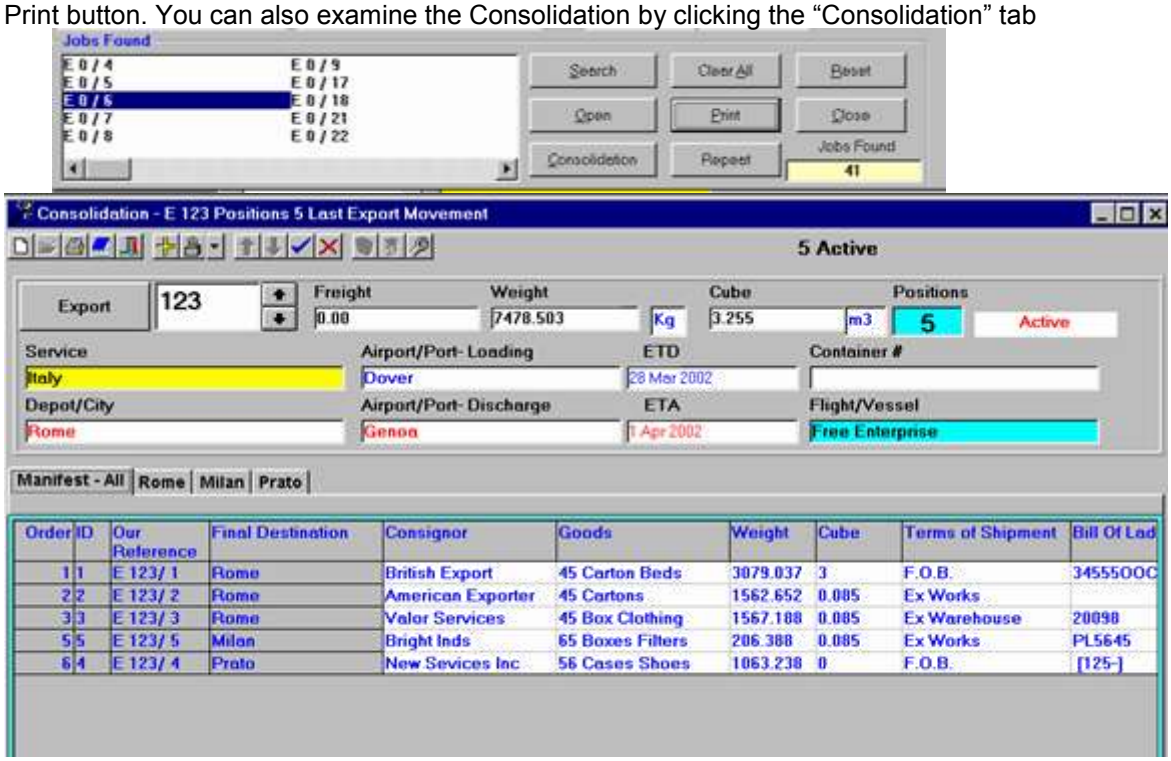
You can scan your own logo into your documents see Database Section.

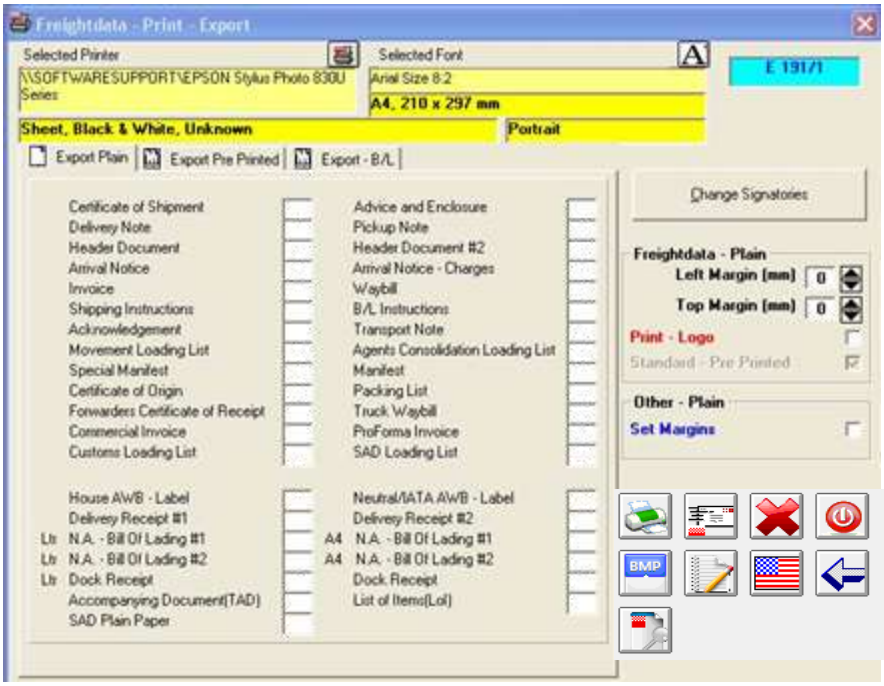




Printing from Job Tracking

Once you have a list of References in the box called "Jobs Found", click on one of the References to highlight it and, then click on the Print button. You can also examine the Consolidation by clicking the "Consolidation" tab





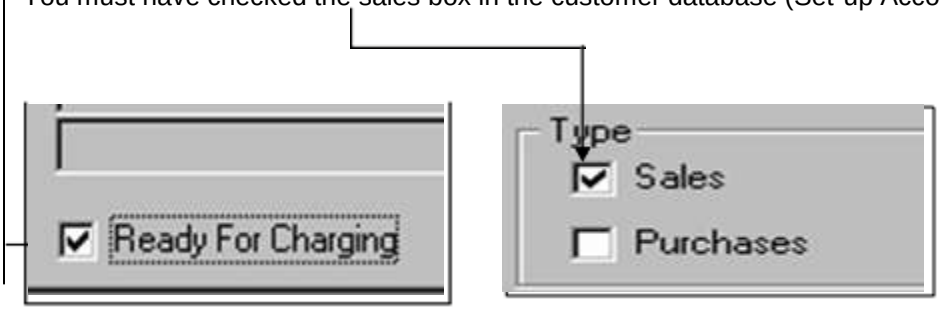
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An Invoice will not Print

In order to print, an Invoice must be charged. You charge an Invoice by clicking on the Ready for charging box and pressing the Charge button on the Charges screen. If a customer is charged, then “Charged” will appear in the Invoice Status box beside his name in the Names and Addresses Screen.

Make sure you have created a Charge Description, see pages 70-71.

You must have checked the sales box in the customer database (Set-up Account).



An Air Waybill will not Print

An Air Waybill will not print if you have not entered the Air Cargo Section for the Job and entered in any details.

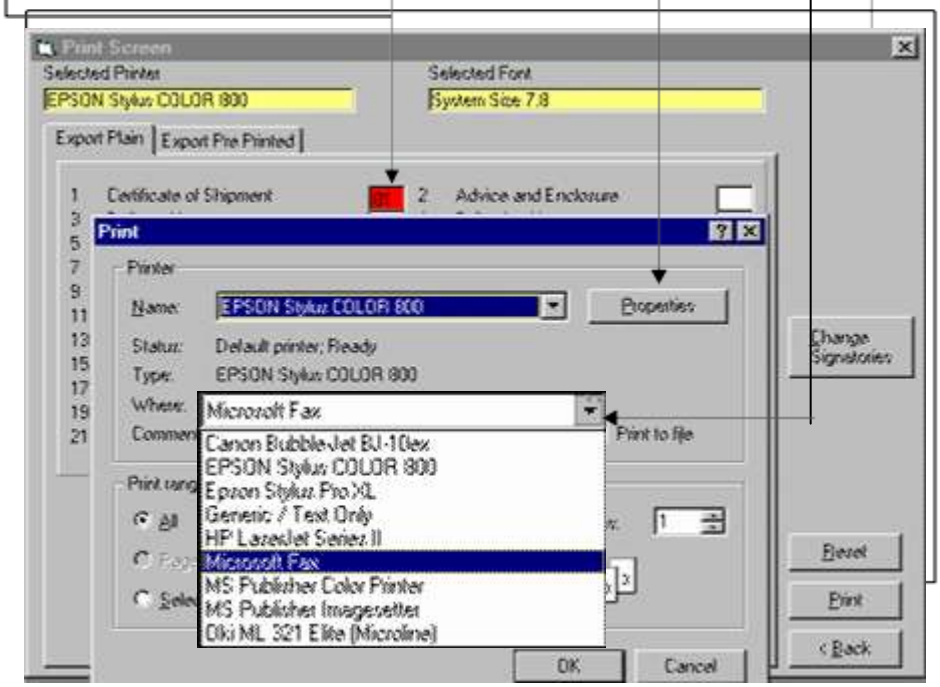
See section on Airway bill (AirFreight) “ICON Provided”.

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How To FAX a document

Because FD2 operates with " Microsoft's Windows you can access the Print Properties to not only access other printers but to also call the Microsoft FAX facility or a supported 98/2000/NT third party product. This means that any Print can be sent via the Fax either directly from your Computer with a MODEM or from a network server. An example display is shown below. Remember you must enter a number in the Print Item Box before you click print.

(1) Enter the number of copies in the Print choice, (2) then click on Print Set-up. (3) Click Properties, then (4) place your Mouse Pointer on the pull down bar and Choose Microsoft Fax. To see more information on the FAX set-up refer To your Windows 98/NT documentation or speak to your dealer.



How

How To Email a document

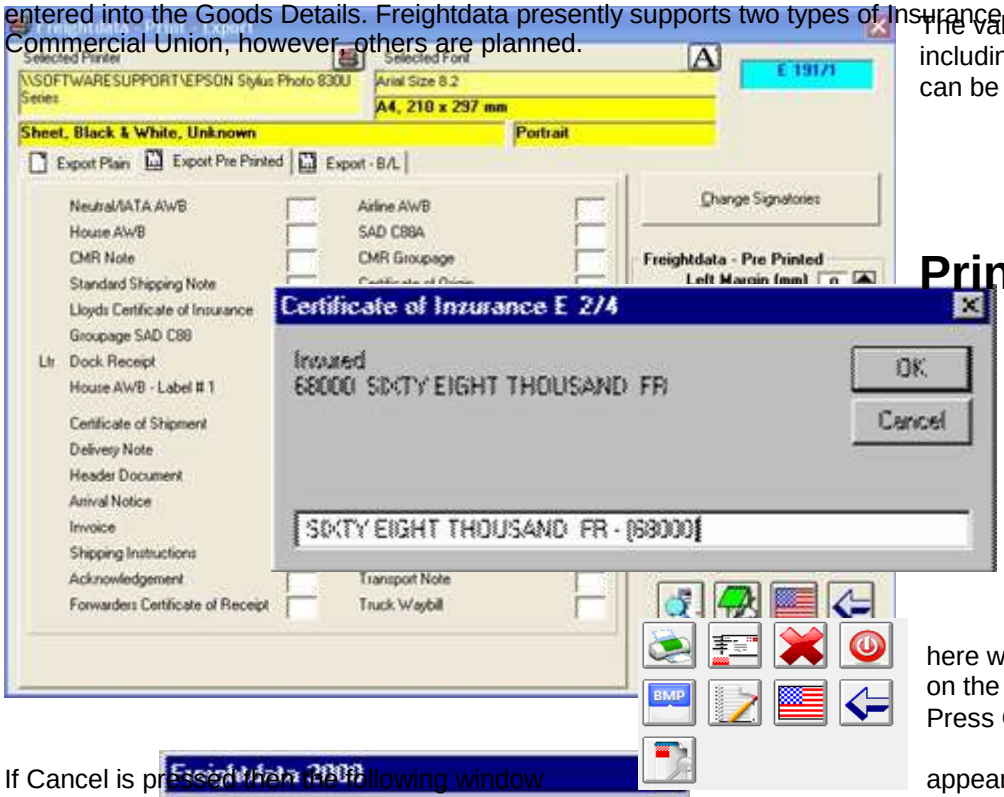
To EMAIL a document just highlight and enter the number of copies you require the click the Fd2email button

then the file will be sent to the ADOBE for sending via the INTERNET

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Printing Insurance Documents

To print an insurance document, highlight the required supplier and the number of documents required. The overlay window will appear confirming the value entered into the Goods Details. Freightdata presently supports two types of Insurance document, Lloyds of London & Commercial Union, however, others are planned.



The value of the goods is displayed including the expected currency. This can be altered to show the Insured value.

Printing Insurance Documents

When the OK button is pressed a further window is displayed showing the amount translated into words as follows:

This can also be altered is required. Whatever is displayed here will appear as the insured amount on the printed Insurance certificate. Press OK to accept and print.

If Cancel is pressed then the following window appears:



If Cancel is pressed here – the screen returns to the print choices with nothing printed.
If No is pressed – the screen returns to the previous window to re-enter the word amount.
If Yes is pressed – the Insurance document is printed with No Amount shown.

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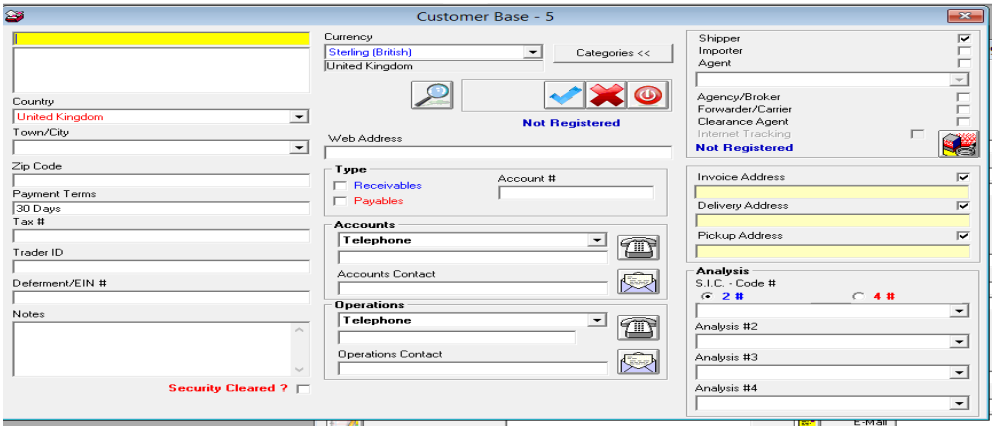
Set-up Menu

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Accounts

From here Names and Addresses can be added to the database for use within the Names and Charges section for each position. When accessed the first alphabetic account is displayed by default. Click the List button to select other accounts or use the New button to create a new name, or the Delete button to delete an existing account.

Use the check boxes at the top of the box to decide which ledgers the account will appear on. The display will provide you with an option to create Invoices in a foreign currency, by selecting the currency required.



The '***Security Cleared'*** tick box allows entry of a date. Used in the airfreight section for displaying/printing whether the shipment is known or unknown cargo. Displays in red if within two weeks of expiry.

Accounts

To Link S.I.C or any other analysis codes to your customer for management information use the pull-down boxes to link through to the analysis section ***(See Set-up Analysis).***

This customer type panel starting with the shipper allows you to have shorter list of names & address in relevant areas. The Internet tracking check box indicates that this shippers cargo will update the Internet.



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Charge Descriptions

Accessed via the Management Menu by clicking on the Charge Descriptions
The Charge Descriptions form allows you to enter Charges and Tax Codes against any Country and City, and also against the Job flow.

Add a Charge Description

Enter Charge Description by clicking on the Management Menu item and on Charge Descriptions. Select a Flow by clicking on the button in the top left of the Form. Select a Country by scrolling through the list of available Countries, and clicking the mouse button on the desired Country. The Cities box will now be filled with all of the Cities from the chosen Country. To select a City, scroll through the list and click the mouse button on the chosen City. When you have chosen a Country and a City, the City name will be listed in the “for” box, and the Country name to the right of that.
Select whether the Charge is for Operations or Waybills, by clicking the mouse button on one of the two Option buttons, labelled Operations and Waybills.
Enter a Charge and a Tax Code by placing the cursor in the first Charge field and typing in the Charge name. If you want a different Tax Code, other than the default Tax Code, which is shown in the box above, move to the Tax Code field by clicking on it with the mouse, and you will see the Tax Code box appear. Click on the Tax Code you want for the Charge and press the Close button.
To accept the Charge and Tax Code, click the Apply button.

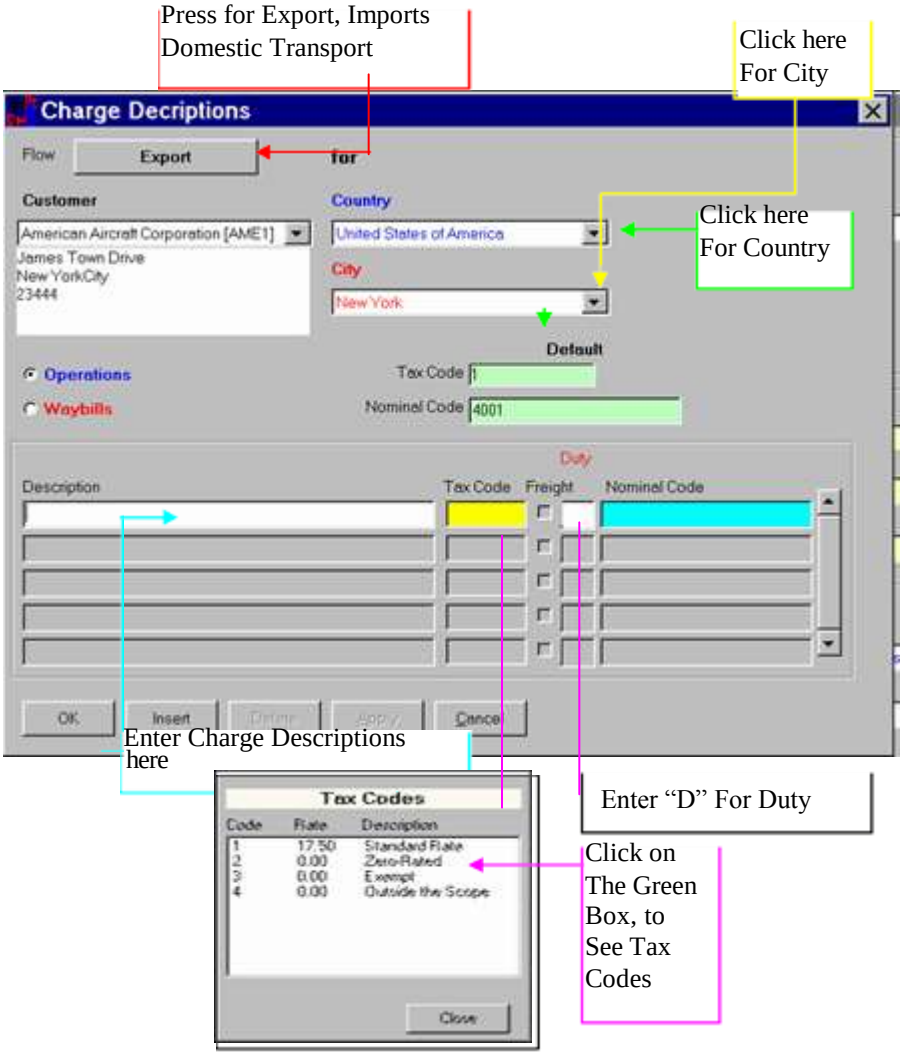
To insert a line for a new charge click onto a charge and press the Insert button. The line will be inserted above the Charge line that you clicked.

Delete a Charge Description

Enter Charge Description by clicking on the Management Menu item and on Charge Descriptions. To delete a Charge click onto the Charge you want to delete and press the Delete button.

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Charge Description Display

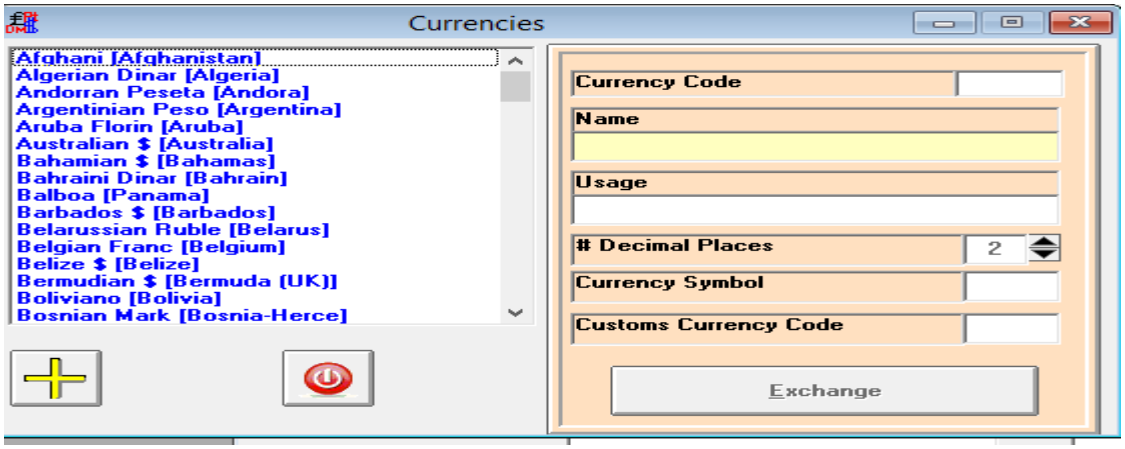


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Currency

Accessed via the Set-up Menu by clicking on the Currency Menu Item.
This form allows you to Add, Edit or Delete Currencies and set up Exchange Rates for those currencies. The Currency code, the name of the Currency and which Country uses it are entered here. The Exchange Rate button becomes active when you click on a currency

Exchange Rate: This is entered via the Currency form and clicking on The Exchange Rate button. The Exchange Rate form allows you to enter in the Current Exchange Rate, the date the rate is effective from and which customer it Is linked to. Exchange Rates can be Added, Updated or Deleted.



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Create a Currency

How to Create a Currency

Enter the Currency Window by Clicking on Set-up Menu and then Currencies.

To create a Currency press the new button and a replacement button appears labelled OK. Then enter the Currency code, For Example: (IT) Italy, then move to Name of Currency and enter “Lira Italy”, move again to usage and enter in the Country where the currency is being used, “Italy”. If you try to leave before correctly completing the required information, the program will call an error screen, giving you the choice of cancelling or returning to complete.

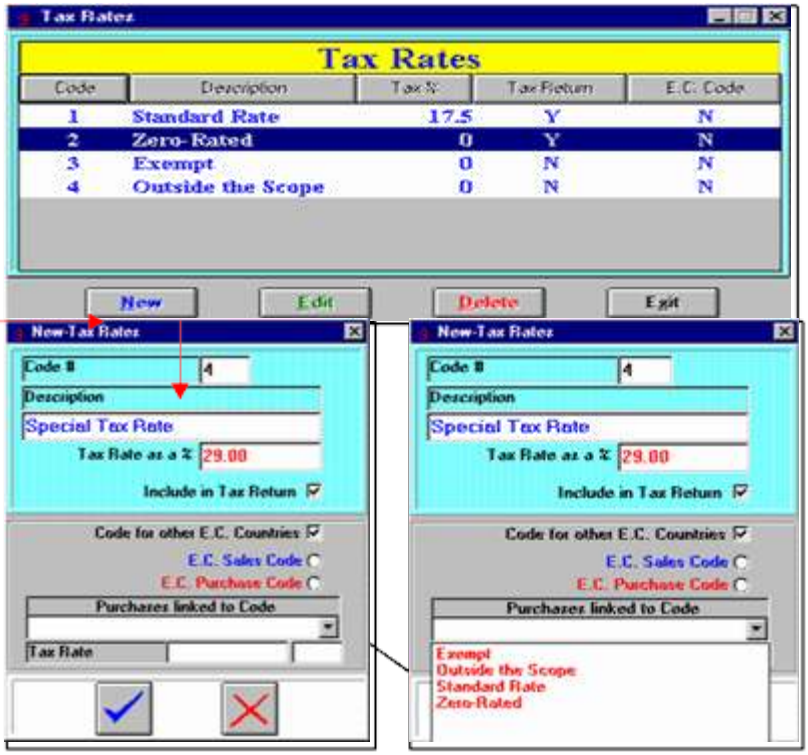
Tax Rates

Accessed via the Set-up Menu by clicking on the Tax Rates Menu Item.

Enter, Edit, Delete, View

Tax rates are used in invoicing and charging. Any existing rates will be displayed in list form. Pressing the appropriate "Button heading" over each column can alter the order of display. If no rates are present, only the “New” and “Exit” buttons will be enabled.

On pressing “New” a window appears with a heading “New Tax Rates”, and the cursor positioned in the code number box. Enter here a number between 1 and 99, which will be the identifier for this Tax Rate. Then move into the description and enter for example “Standard Rate Tax” then follow with the tax rate percentage.



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Include in Tax return

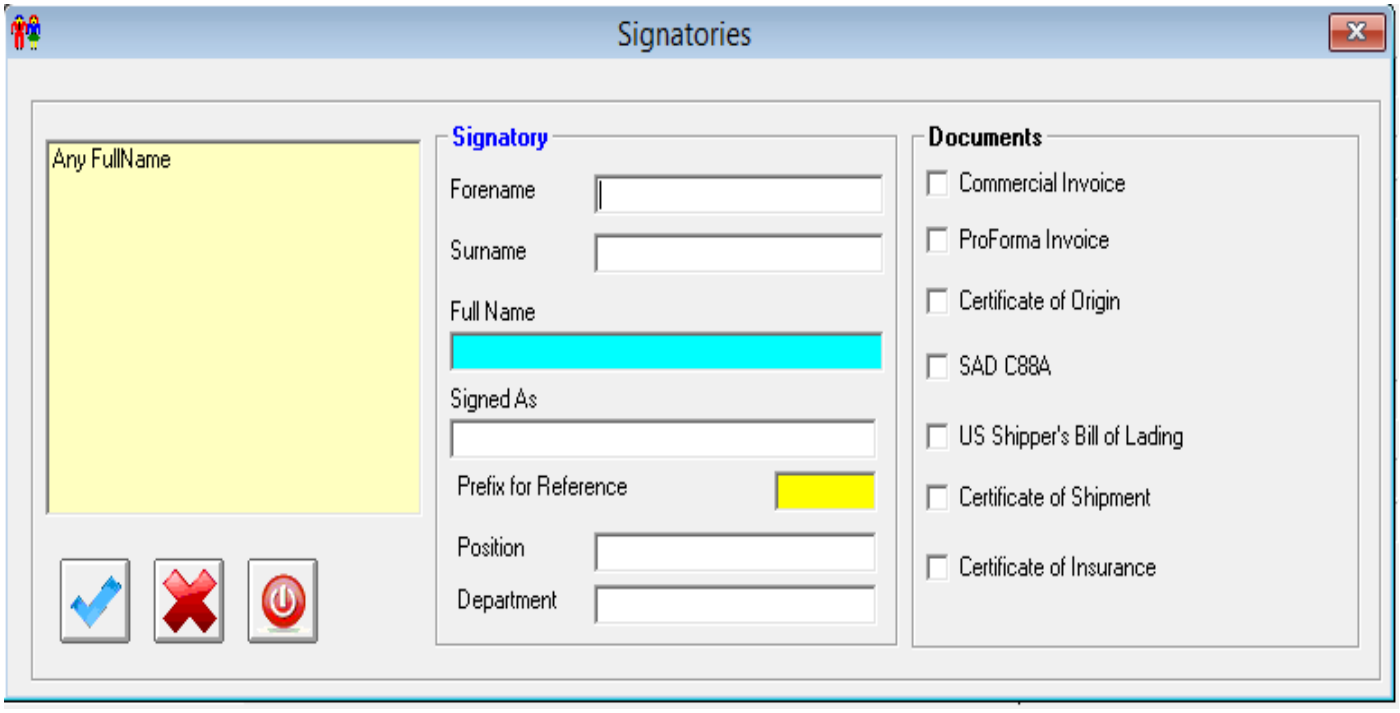
Tick this box if details for this Tax Rate are to be included in your Tax return.

Codes for EC Countries

Are appropriate to the laws governing those Countries.
If the rate relates to transactions with EC countries, enter the following details in the EC Code area:
EC Code
EC Sales/EC Purchases
Link

Signatory

You can pre-set names (Signatory) to certain documents when they print. This can be changed and edited here and in the print menu.

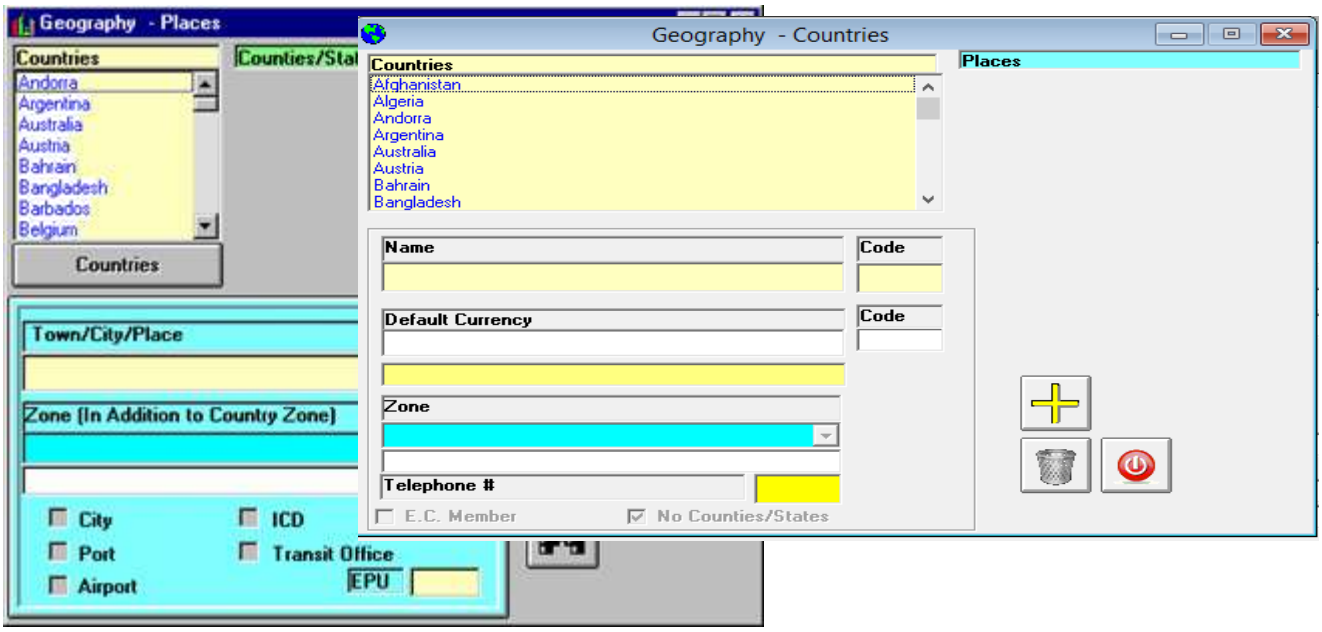


Geography

Accessed via the Set-up Menu by clicking on the Places Menu Item. When you click on Places you have a choice of going into the Zones section or the Places section. Click on a picture to enter that section.

How to Create a New Country

Enter the Places Window by Clicking on the Set-up Menu and on Places. Then select the Places button. To create a new Country, press the Countries button under the Countries list. The Countries window will appear (If you have previously chosen a Country on the Countries list of Places window, this will be displayed.). You may notice that on this window, details may already be displayed, if so, press “Cancel” to clear the screen.



How to Create a New Country - Continued. To enter a new country, press the “+” button.

The cursor will move to the name box where you enter the name of the new Country.

Enter a three character code for the country, e.g. France “FR” and choose a default currency which appears on clicking the default currency box. Now you must choose a zone from the drop down zone list. For Example pick “Europe”. Tick the EC Member box, as this country is a member of the EU/EEC. The final tick box is used to indicate whether this Country is to be sub-divided into Counties/States, e.g., the “US” is divided into States therefore leave this box unchecked.

Zones

Enter the Zones Window by Clicking on the Set-up Menu and on Places. Then select the Zones button.

Clicking the Country then the Zone Description Order allows you to list the Zones in alphabetical order of their descriptions and, clicking on Zone identifier Order allows you to list the Zones in alphabetical order of their Identifiers. To create a new zone press the New button and a replacement button appears labelled OK. Enter in a Zone Description For Example: “Australia, New Zealand, Tasmania”. Then move to Zone Identifier and enter “Australasia”. Click on OK to save the Zone.

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You can also delete and Update zones just by clicking on the required zone in the list.

State:

See Create a New State/County/Province

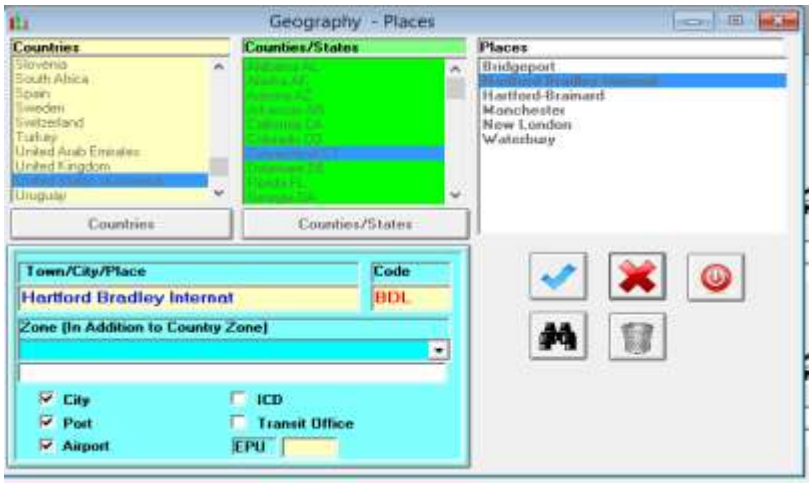
County

See Create a New State/County/Province

Province

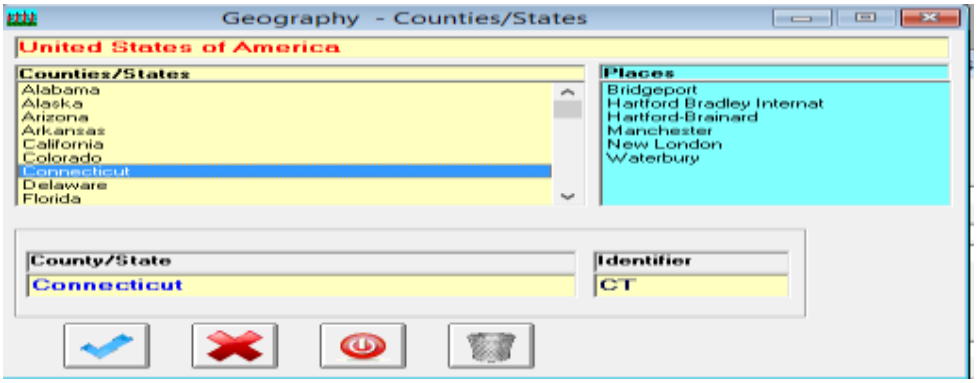
See Create a New State/County/Province

Create a New State/County/Province



How to create a New State/County/Province

Enter the Places Window by Clicking on the Places button.
This can only be performed if the country is sub-divided. (Tick box on Countries screen). Firstly from the "Places" Window highlight the Country required. A second list appears containing current Counties/States.
Under the list is a Counties/States button. Press this button for the State window for the chosen Country to appear.



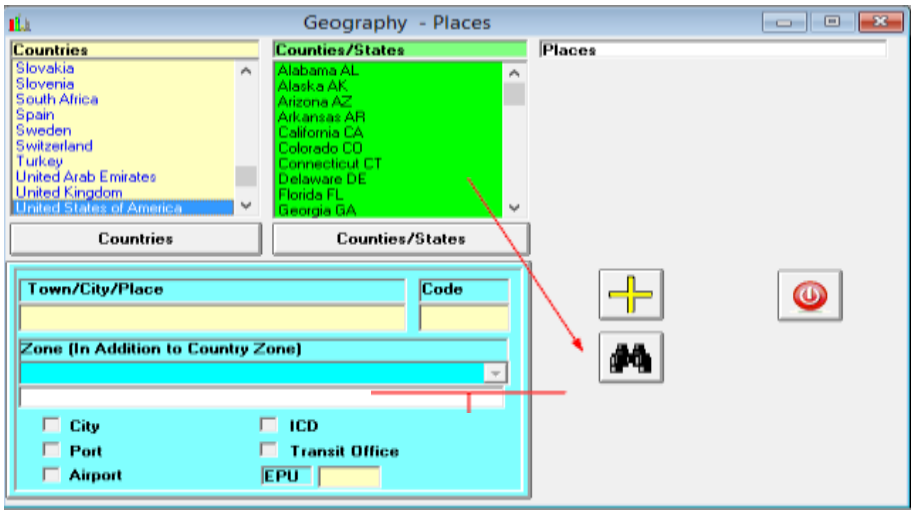
If details are already displayed press "Cancel" to clear the screen.
This will replace the "Tick Button" with a "+" sign. Press "+" and the cursor will move to the County/State box where the name of the County/State is entered. The identifier box is not required but you may want to enter a state code or Zip Code etc. Press OK to accept.

Create a New State/County/Province

If details are already displayed press "Cancel" to clear the screen.
This will replace the "Tick Button" with a "+" sign. Press "+" and the cursor will move to the County/State box where the name of the County/State is entered. The identifier box is not required but you may want to enter a state code or Zip codes etc Press OK to accept.

.

Place



How to Create a New Place

Enter the Places Window by Clicking on the Set-up Menu and on Places. Then select the Places button.

To create a place, choose a Country from the list by using the scroll bars or typing just the first few letters of the name, For Example, type “US”(United States) will be highlighted, all current places for this country will appear in the places
list. If this country is sub-divided into States, Counties, or Provinces, a list will appear first under the Middle list.

To create your new place press the “New” button, the cursor will move to the Town/City/Place box where the new name can be entered. Type your new place e.g. “Florida” a code for customs purposes can be entered if required. The zone is not required, as the place will automatically take the zone of the country. Now click the appropriate status box e.g.; Calais is a Town and a Port, Note: If this Country has Counties/States, places have to be allocated to an individual county/state.

Edit/Delete Places

Edit/Delete Places Window by Clicking on the Set-up Menu and on Places. Then select the Places button.

To Edit or Delete a place, choose a Country from the list by using the scroll bars or typing just the first few letters of the name, For Example, type “US”(United States) will be highlighted, all current places for this country will appear in the place list. If this country is sub-divided into States, Counties, or Provinces, a list of them will appear first under the Middle list. Highlight the place name in the Places list, E.g., JFK New York or press the binoculars/view button to show all places in all Countries, selecting the place on this full list and pressing OK will
Bring the details into the places screen

Moving the cursor to the appropriate field in the bottom half of the screen will give access to altering the details. (See New Places for further information). Press Update to accept the changes, Cancel to ignore changes or Delete to remove the place.

View Places

Enter the Places Window by Clicking on the Set-up Menu and on Places. Then select the Places button.

VIEW BUTTON

To view a Place click on the Binoculars button. A window will appear with a Grid in it containing three lists, one of Towns/Cities/Places, one of Countries and one of Counties/States.

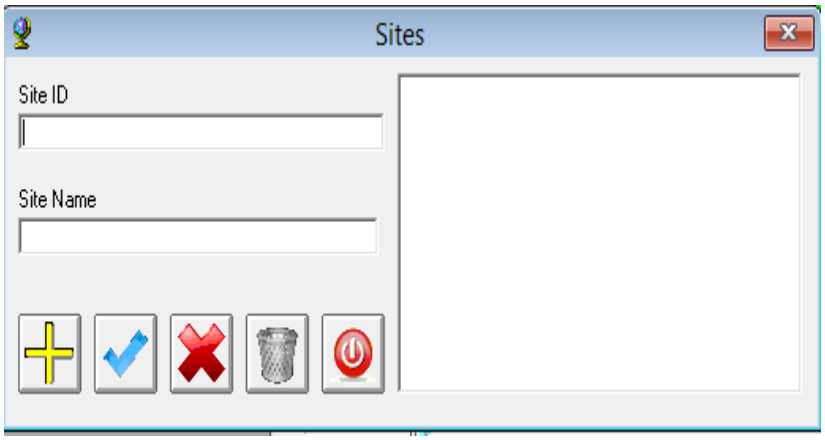
Above the Grid are three buttons:-
1) Town/City/State. Lists all the places in alphabetical order of place names.
2) Country. Lists all the places in alphabetical order of country names.
3) County/State. Lists all the places in alphabetical order of County/State names.

Selecting either a Town/City/Place or a Country or a County/State and clicking OK will take you back to the previous screen and display the place.



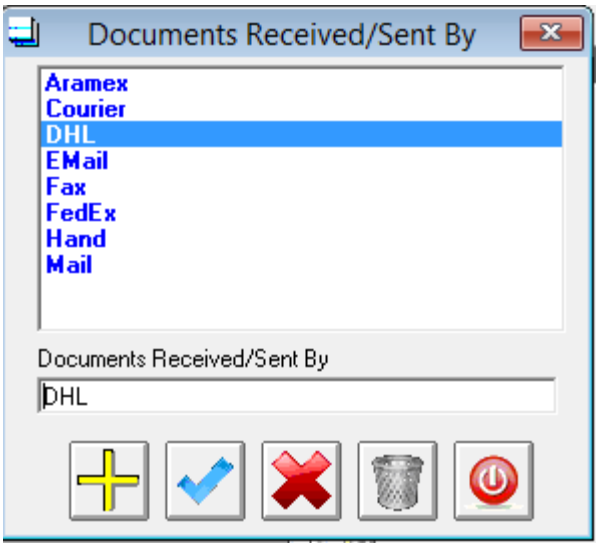
SITES

Sites can be Set-Up in your system to automatically show the option of sites offices in your company.



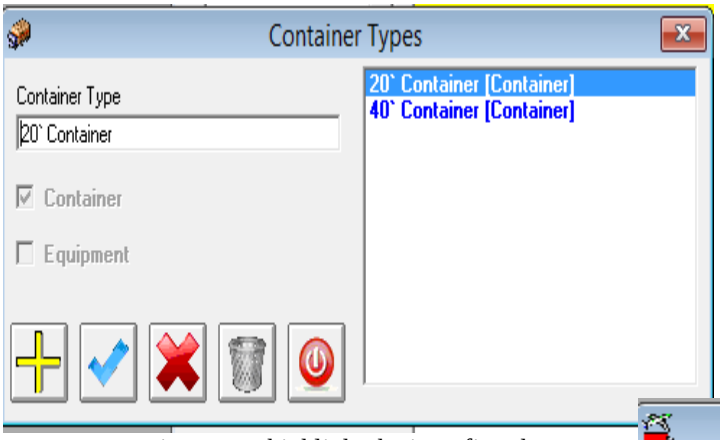
To complete the site information Choose the "+" sign the enter a Site ID then the full site name
Below. To delete any name highlight the name then click the "Waste bin"

Freightdata 2000



Documents Received & Sent By

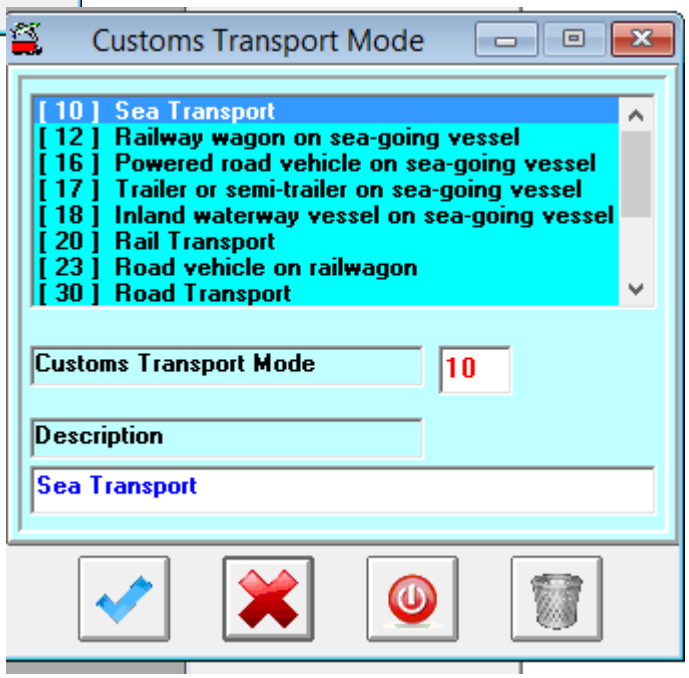
To record automatically the Documents Received/Sent enter your chosen carriers here
this can be accessed in you main programs to call instantly your required carrier.



Container Types

Here you can set-up your container types for use in the main cargo screen. Click the "+" button to add each individual type of container. Then click the check button each time. If you wish to delete container type, highlight the item first then "Waste bin".

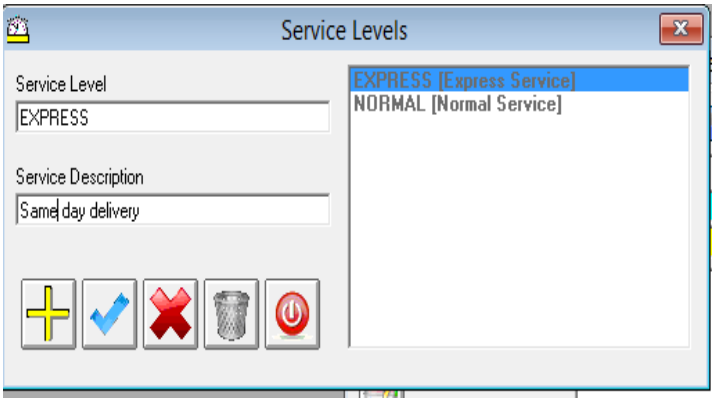
Customs Transport Modes



You can choose the required mode of transport suggested by Freightdata, which is set in your system. These modes can be automatically called within your program. You can create your own modes by entering the information into the Description box and then clicking the Click button. Don't forget to enter your custom modes.

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ServiLevels

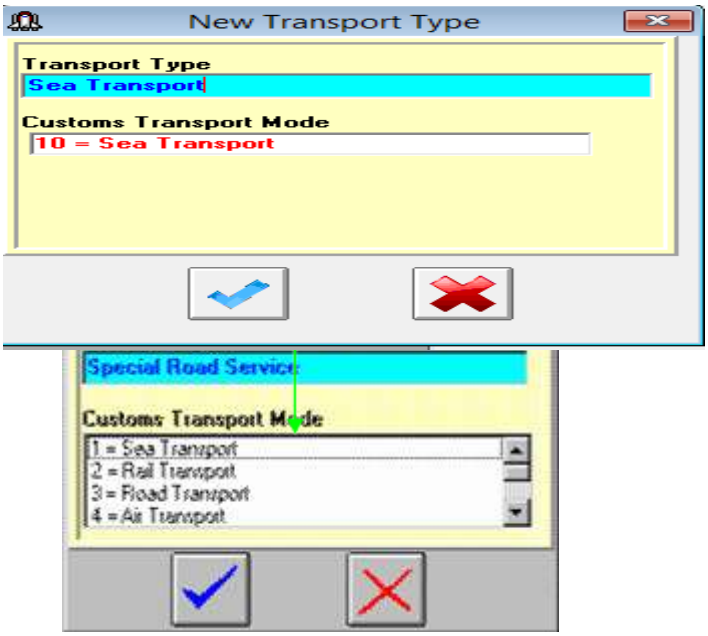


Service Levels will be available in the “Main Cargo Screen” To enter the type of service level you require complete the information below. Freightdata already provides to types of service level “Express & Normal. To add a service level click the “+” button then add your service and click the confirm button. To delete the service click the “Waste bin”

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Transport Modes

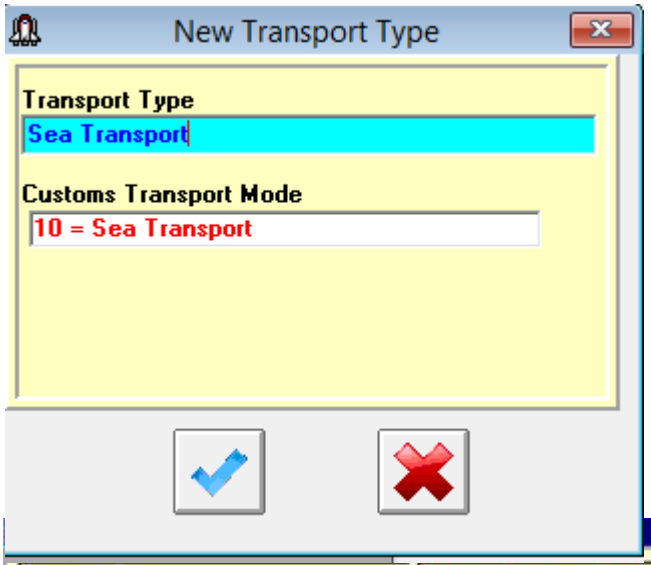
Accessed via the Set-up Menu by clicking on the Transport Modes Menu Item.
This allows you to add, edit or Delete Transport Types.



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Add a Transport Type

Enter Transport Modes by clicking on the Set-up Menu Item and on Transport Modes.



Click on the New button. The New Transport Type Window will be displayed.
Enter into the Transport Type box the Transport Type. Move to the Transport Mode Drop Down List box.
Select a Transport Mode from the Drop Down List box and click on OK. The Main Transport Type window will appear.



Edit a Transport Type

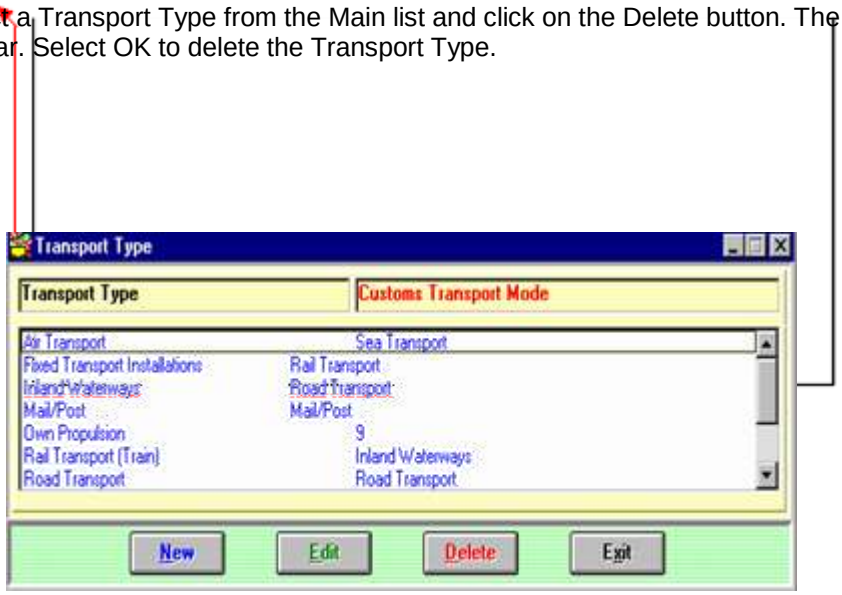
Enter Transport Modes by clicking on the Set-up Menu Item and on Transport Modes.

Select a Transport Type from the Main list and click on the Update button. The Edit Transport Type window will be displayed.
Enter into the Transport Type box the new Transport Type. Move to the Transport Mode Drop Down List box.
Select a new Transport Mode from the Drop Down List box and click on OK. The Main Transport Type window will appear.

Delete a Transport Type

Enter Transport Modes by clicking on the Set-up Menu Item and on Transport Modes.

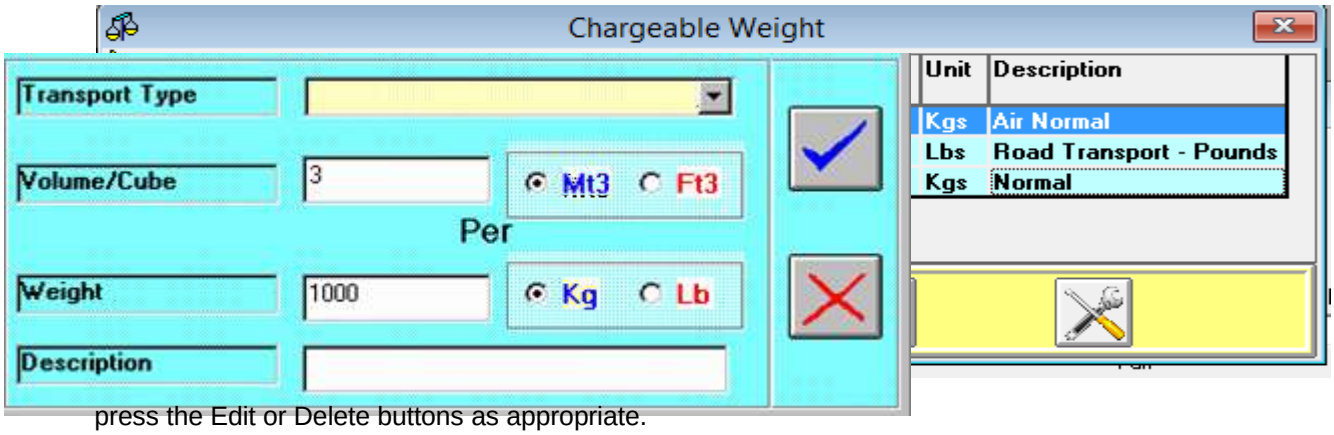
Select a Transport Type from the Main list and click on the Delete button. The Delete Transport Type window will appear. Select OK to delete the Transport Type.



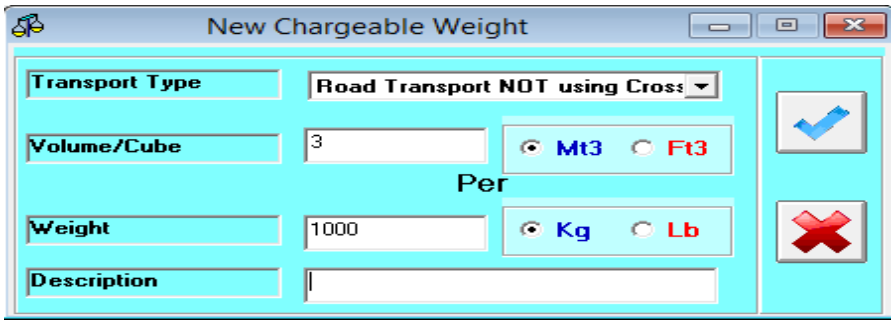
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Chargeable Weights

Enter set-up menu; choose “Chargeable Weights”. A list will appear of Chargeable Weights, if there are no entries on the list, only the New and Exit buttons are enabled. Press “New” to enter a new Chargeable Weight or select a Chargeable Weight and press the Edit or Delete buttons as appropriate.



On pressing “New” the window New Chargeable Weight appears. The cursor will be positioned at the Transport Type field waiting for the user to select a Transport.



Type from the drop down list. Choose the type of transport to which the Chargeable Weight formula is to apply e.g., “Air Transport”.

Now enter the appropriate rates in the Volume and Weight fields, choosing Metric or Imperial units as appropriate, e.g. 6Cu M3 per 1,000 kilos for Air Transport or 3 Cu M3 per 1,000 kilo for Road Transport. The description field must be entered to provide a meaningful general description, e.g. “Europe Excluding Greece”.

More then one Chargeable Weight can be Set-up for a Transport Type, distinguished by the description

Vessels

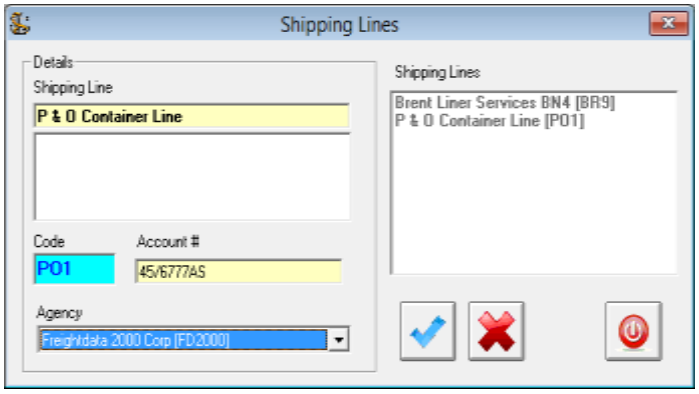
Accessed via the Set-up Menu by clicking on the Vessels Menu Item. This allows you to add or delete vessels for a specific country.

Shipping Terms

Enter Shipping Terms by clicking on the Set-up Menu item and on Shipping Terms.

Click the New button. This will position the cursor in the Terms of Shipment box and the caption on the new button will change to OK. If the New button is not visible then click on Update, the caption on the Update button will change to New.
Enter in a Term of Shipment and move to the Freight Payable box. Select either Origin or Destination by clicking on the box. Clicking on the box toggles between the two. Move to the Customs Code drop down list box.
Select a Customs Code as defined using the HMC button. The description of the code will appear in the box below. Then click the OK button. The Caption on the button will change to New.

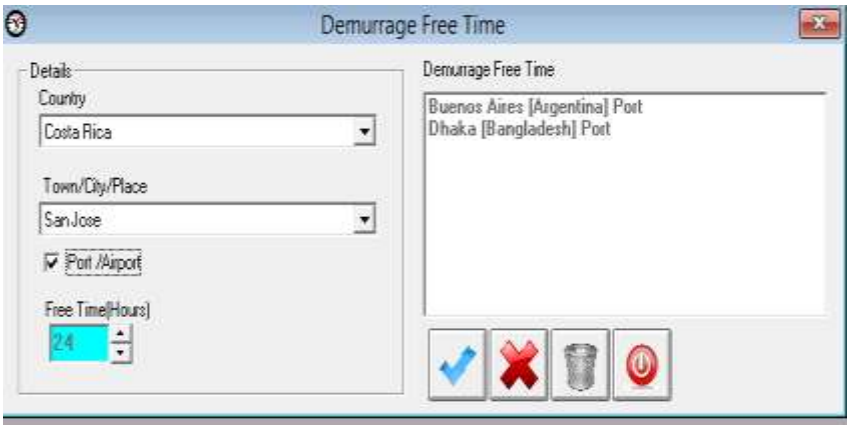
If there are no Shipping Terms entered at all then the OK button will be displayed and the cursor will be positioned in the first box, when the form is loaded.



Shipping Lines

Shipping Lines can be access via your “Main Cargo Screen. Here you sent up the lines you deal with on a regular basis saving time and money. Click the “+” button to add Shipping Lines.

Demurrage Free Time

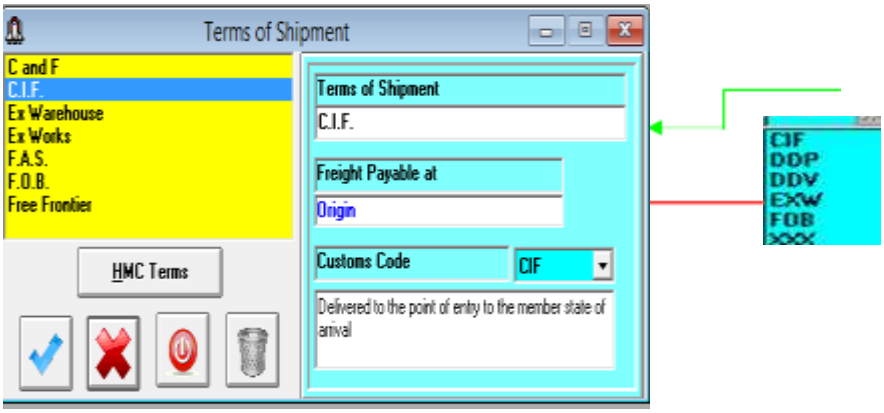


Demurrage Free time is listed here for notes on the shipment movements. Therefore this section records the amount of time cargo is held up but provided for in “Demurrage Free” time.
Normally delays after the free time are recorded for charges as full demurrage (Rent Storage Charges).

Edit a Shipping Term

- Enter Shipping Terms by clicking on the Set-up Menu item and on Shipping Terms

To edit a Shipping Term select a Term from the list box. The Update button will become visible.
Enter in a Term of Shipment and move to the Freight Payable box. Select either Origin or Destination by clicking on the box. Clicking on the box toggles between the two. Move to the Customs Code drop down list box.
Select a Customs Code as defined using the HMC button. The description of the code will appear in the box below.
Then click the Update button. The Caption on the button will change to New.



Delete a Shipping Term

- Enter Shipping Terms by clicking on the Set-up Menu item and on Shipping
Terms. Select a Shipping term from the list box and click the delete button.

Customs Button

Enter Shipping Terms by clicking on the Set-up Menu item and on Shipping Terms.

The Customs button can only be selected once a Shipping Term has been selected. Clicking on the HMC button displays the Customs Shipping Term screen.

The New button allows you to enter in a new Customs Shipping Term. If the New button is not visible, then click on the Update button, this will update the current Customs Shipping Term, clear all the fields and display the New button. Once the New button has been pressed the OK button becomes visible.

The update button saves an existing Customs Shipping Term after it has been edited. To select a Customs Shipping Term for editing, click on the Customs Shipping Term in the list box.

The Delete button deletes the selected Customs Shipping Term. To select a Customs Shipping Term for deleting, click on the Customs Shipping Term in the list box.

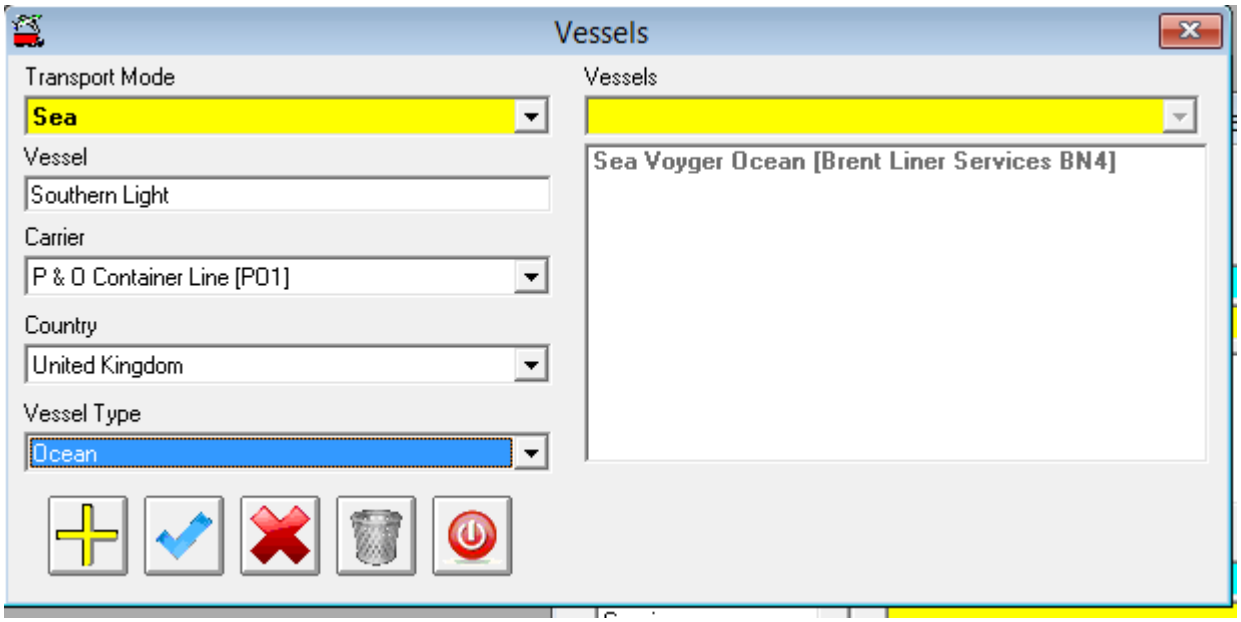
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Add a Vessel - To Add a Vessel to Country

Enter the Vessels Window by clicking on the Set-up Menu item and then on Vessels. See Opposite page. Click onto the country and then type the vessel name into the box above the Vessel list. Then click the Add button.

Delete a Vessel - To Delete a Vessel from a Country

Enter the Vessels Window by clicking on the Set-up Menu item and then on Vessels. Click on the country that contains the Vessel, click onto the vessel name to be deleted and then click the delete button.

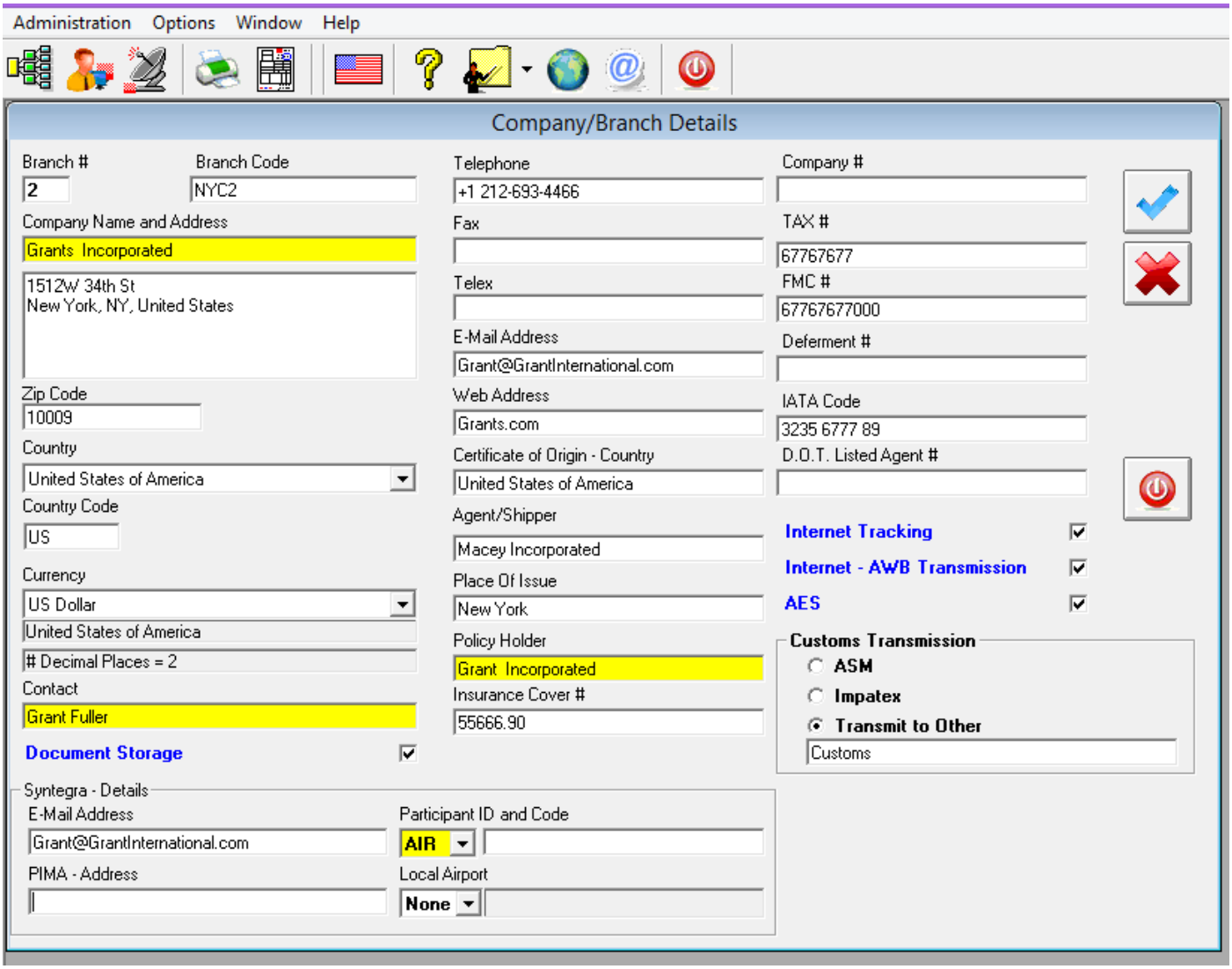


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Company Details

Accessed via the Security Program via the Administration Menu by clicking on the Company Details / Branch Details. Company or Branch details are entered here and are then used in forms and document printing depending on the users choice of Company/Branch Details.
The Country entered here will become your default Domestic country. The Currency entered will be the Local Currency.
The first option available is for a Branch. You can set the Branch Code and description of up to 99 different locations. If wish to set up another branch

Click the **Add Button** and complete the new information required.
Click the pull down ***branch*** arrow and select the next Branch Number .You then just re-enter the information for each branch.
Also available is the link to FD2000 Tracking software (CargoFind→) and Electronic Air Waybill links to the Airlines. You will need Modem type connection as well as an Internet Service Provider (ISP) to use this software, contact your dealer for more information. Document storage can also be defined here.

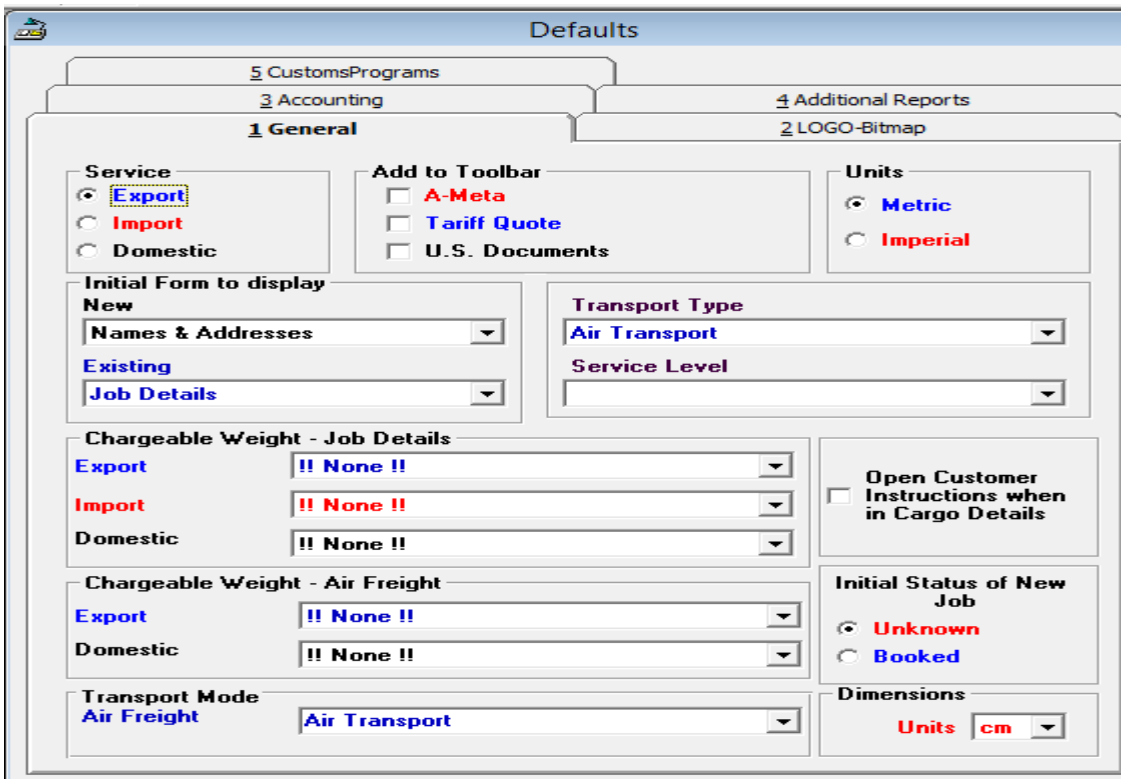


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Defaults

General tab: Accessed via the Set-up Menu by clicking on the Defaults Menu Item. The “Initial Form to Display” frame contains a list of forms. Click on the form that you want to display immediately for new and existing jobs. In the same way you can set your chargeable weights preferences. You can choose to include the A-Meta “ICON” and/or the Tariff Quote Icon in your toolbar. There is also the option to choose Export/Import & Domestic Services together with Units of measure.

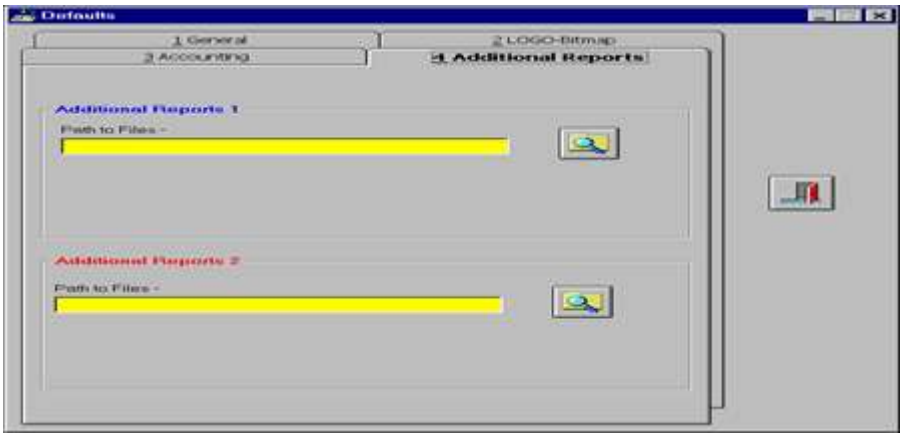
Accounting tab: Accessed via the Set-up Menu by clicking on the Defaults Menu Item. If you click the Accounting ***tab*** you can set-up the locations of the Accounts Link (if any) for the program. With all Accounting links you may choose to work off-line (*See FD2 Accounting & Job Costing Links Manual*)
The *tab for logo bit map* can also be accessed here.



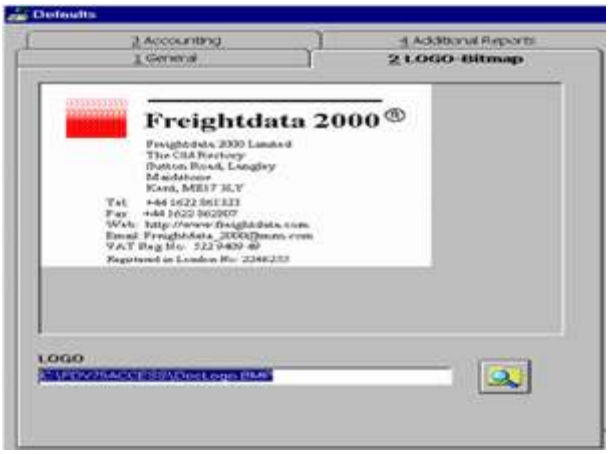
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Additional Reports

This option allows you link additional programs used for reporting to freightdata. These additional options will appear on the file and print menus



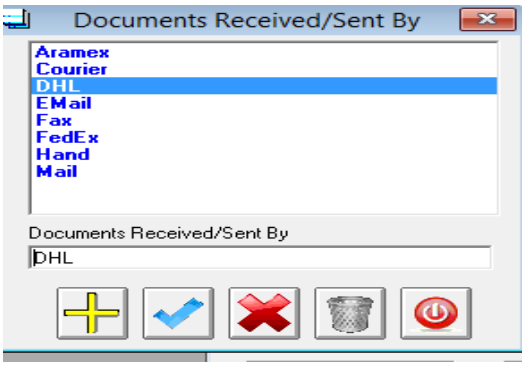
Logo Bitmap: **Links your bitmap to your headed** documents.



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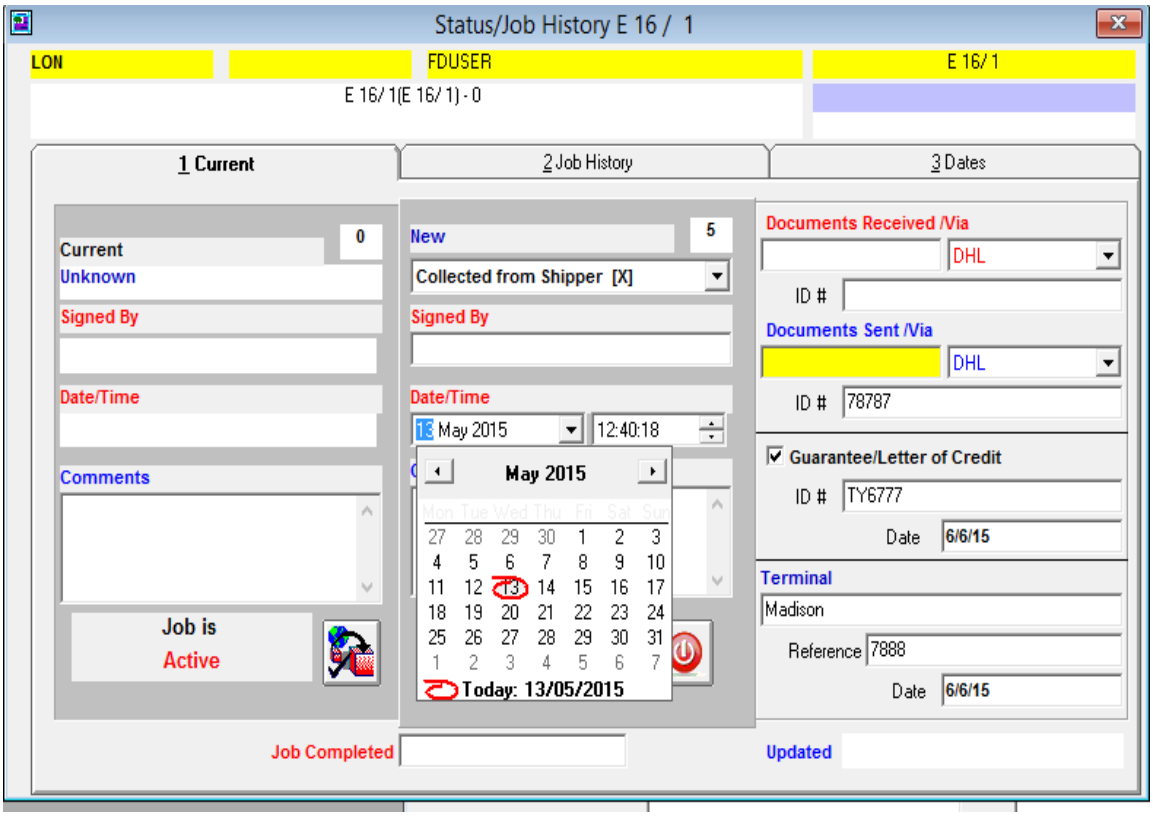
Documents Received/ Send By



Found in the SETUP Menu this

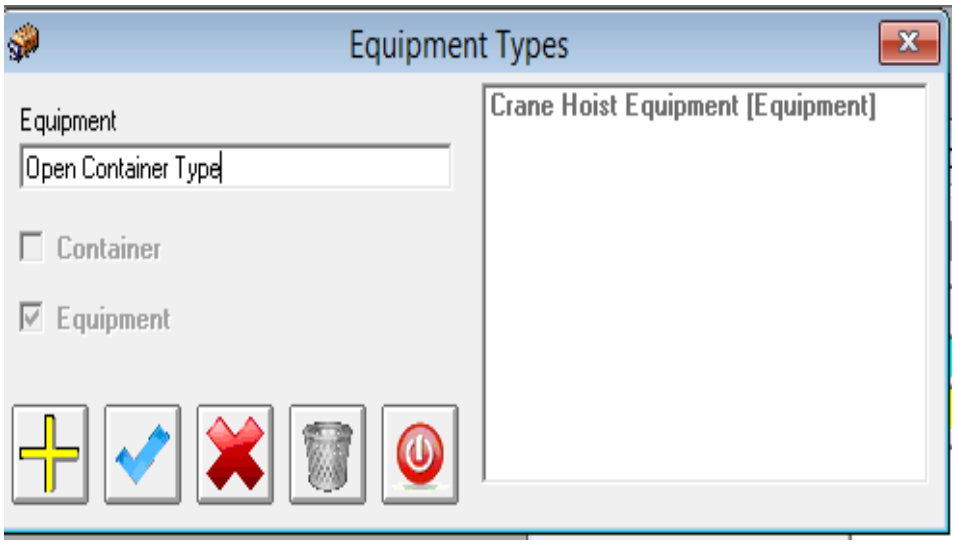
forms part of the History of the

consignment.
By Checking the sender this record transfers to the history section found in update history section below



Equipment Types

This option can be found in the Set-Up Menu. It provides a description of equipment used for transportation.

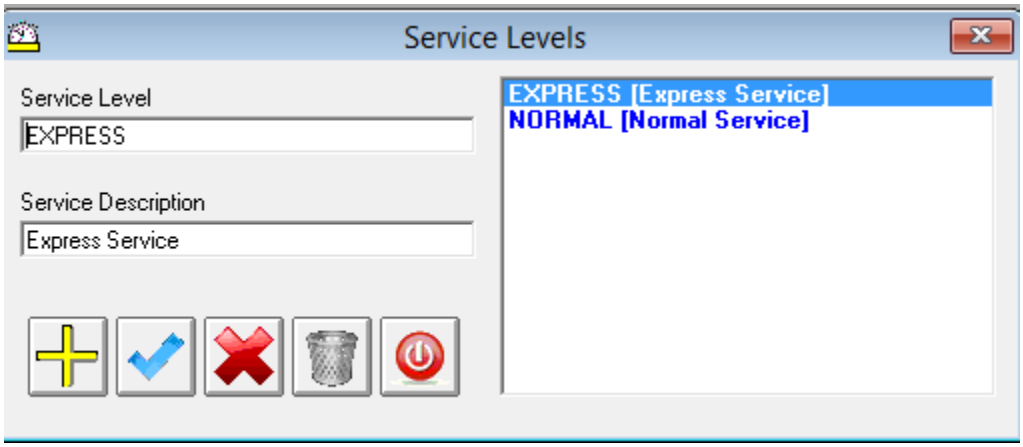


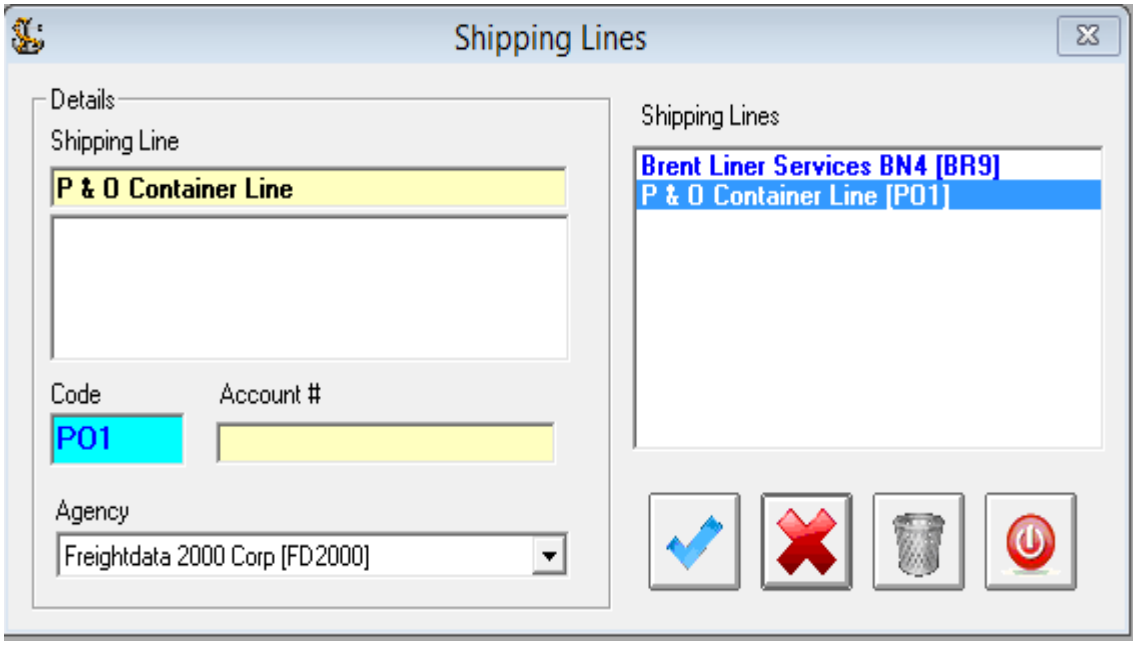
Container Types

Provides the option to add different types of containers that can be accessed via the Container option in the main Cargo Details

Service Levels & Shipping Lines

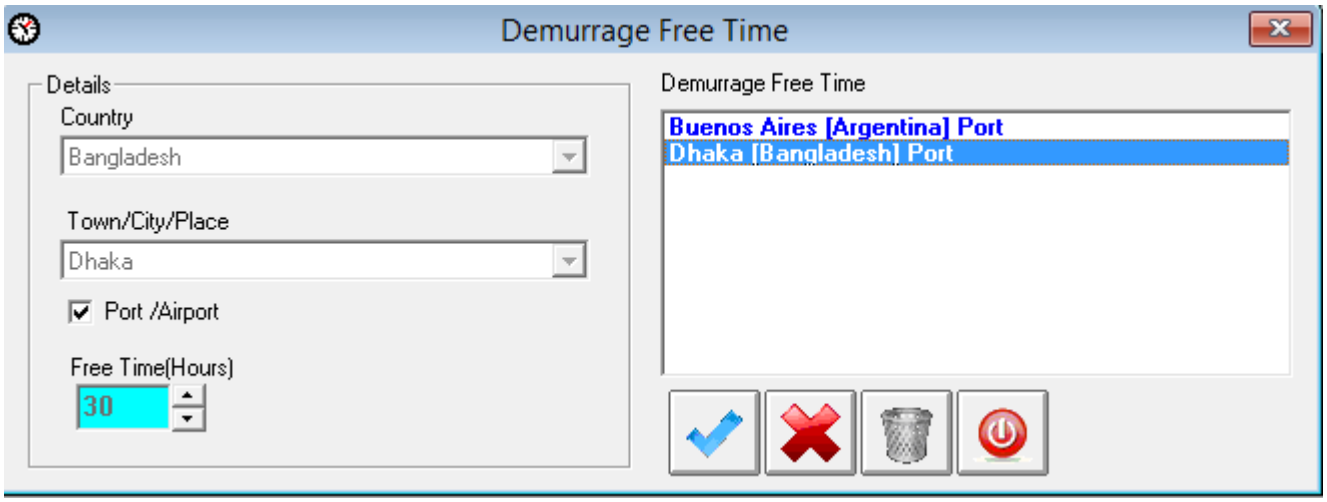
Here you can add the type of service you wish to add to the main cargo & Air Freight displays. Also the menu option below in the SETUP provides the registration of Shipping Lines

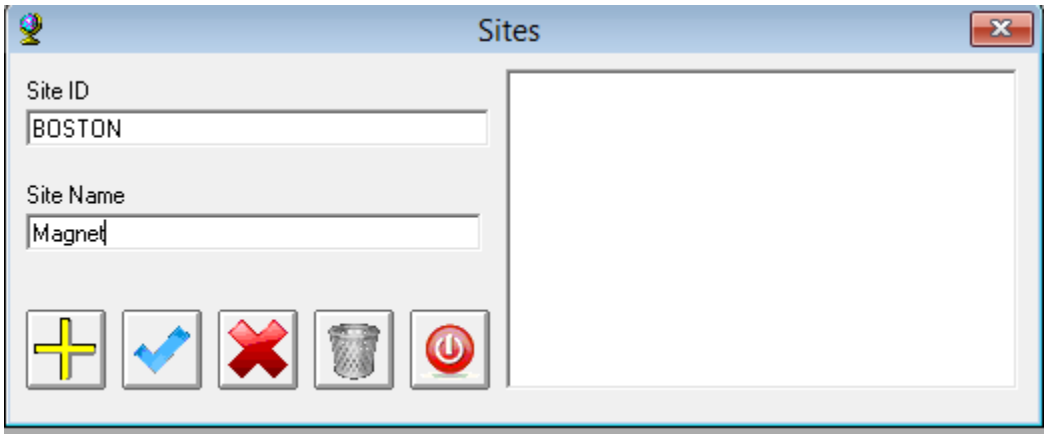

Service Levels
Service Level
EXPRESS
Service Description
Express Service
EXPRESS [Express Service]
NORMAL [Normal Service]


Shipping Lines
Details
Shipping Line
P & O Container Line
Code
PO1
Account #
Agency
Freightdata 2000 Corp [FD2000]
Shipping Lines
Brent Liner Services BN4 [BR9]
P & O Container Line [PO1]

Demurrage Free Time/ Sites

Obviously it is useful to keep a record world wide of ***Demurrage Free Time.***
Here you can add the record of times all over the world. Use the + button to create this places and times. Sites are used for cargo identification of your cargo. This displays in the main Cargo screen

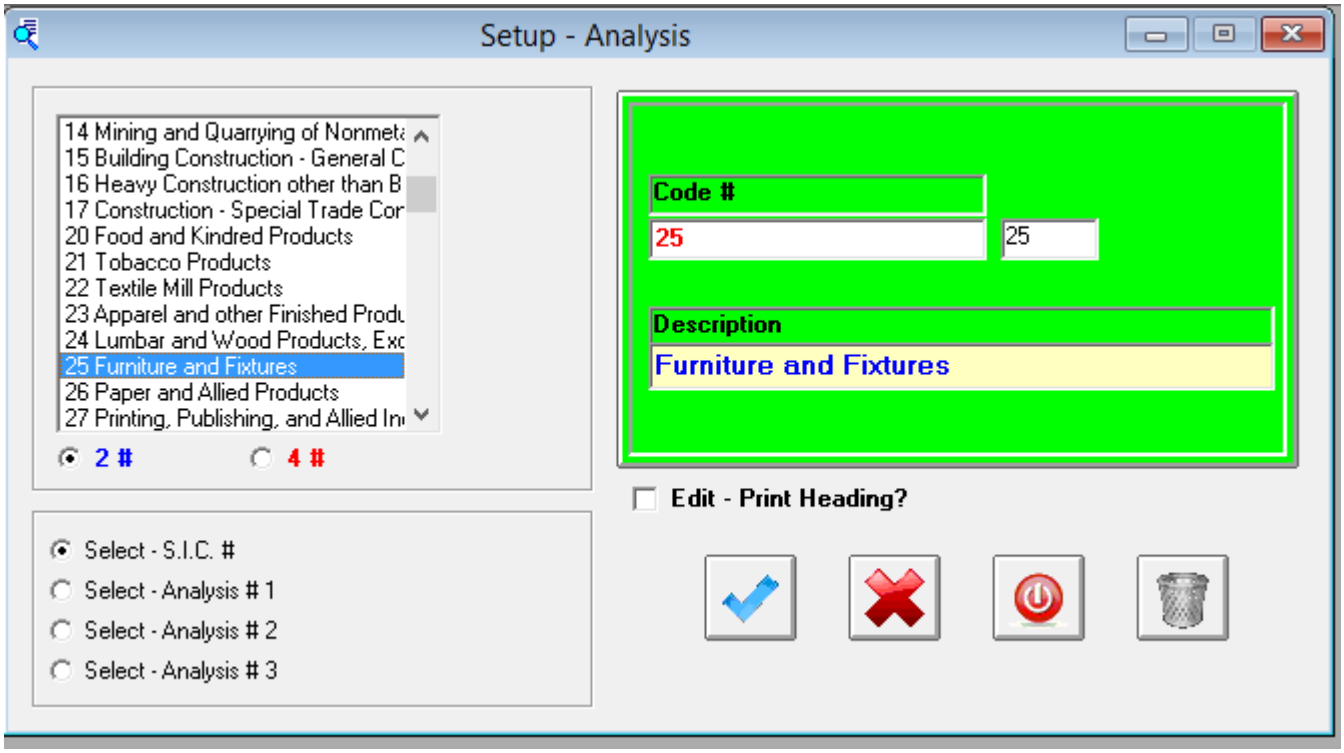




Set-up - Analysis

Using the Set-up Analysis allows you to create or edit codes for Management Information. The main S.I.C.(Standard Industry Codes) codes are already created in your database. You can use a 2 or 4 digit codes. The other Analyses can be used to represent data in any way that is relevant to your Company. The first Analysis uses a numeric code, the final two are alphanumeric (No Spaces). For example you may wish to provide Management data by Sales Representative or by Regions.

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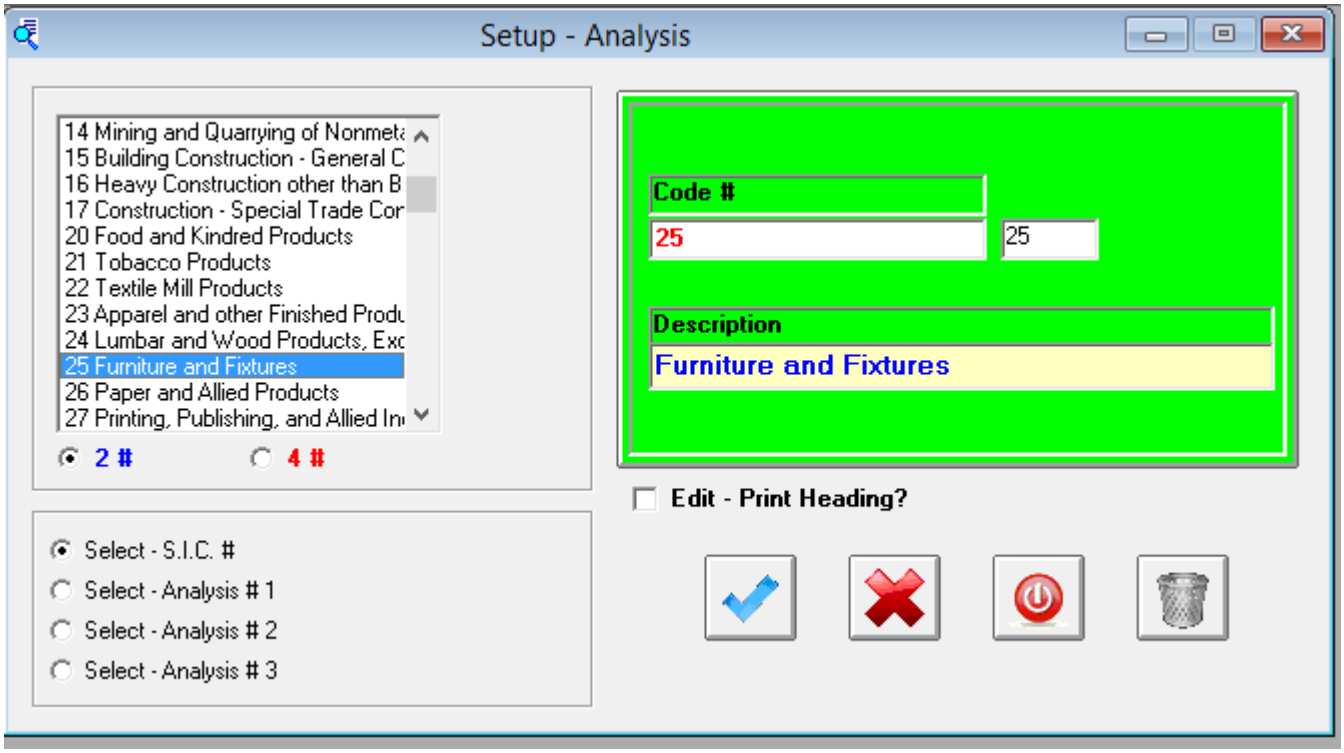


Set-up - Analysis

Having decided on what your Analysis Codes are going to represent, you can now give them a more meaningful Heading.
To do this first select the Radio button for the Analysis code you want to change, then click the ***Edit – Print Heading*** check box. You can now enter the Heading of your choice into the Description box.

After accepting this, all windows that display the Analyses, such as the Accounts Set-up and Management Information, will now display the new heading.

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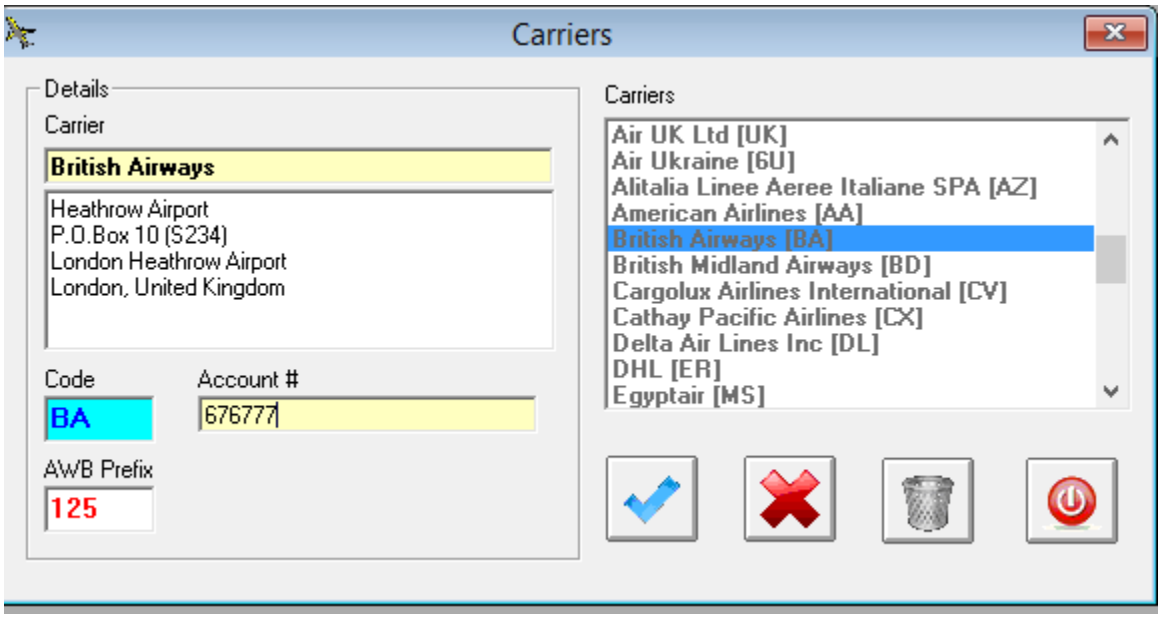
Air Cargo -

Setup Options

Freightdata 2000

Carriers

Accessed via the Set-up Menu, Air Cargo, by clicking on the Carriers Menu Item.
Set-up Air Freight Carriers for use with the Air Freight Window. A list of current Carriers is displayed in the list box on the right. To add a new Carrier click the (Add New) button and enter the Carrier name, Head office address, Carrier code and Air Waybill prefix. In addition if you have an account with this carrier this too can be entered.



Click the (Accept/OK) button to add the new carrier. The (Cancel) button will cancel any changes.
To alter an existing carrier, click the name on the list box, alter the information in the boxes and click the Accept/OK Button when finished.

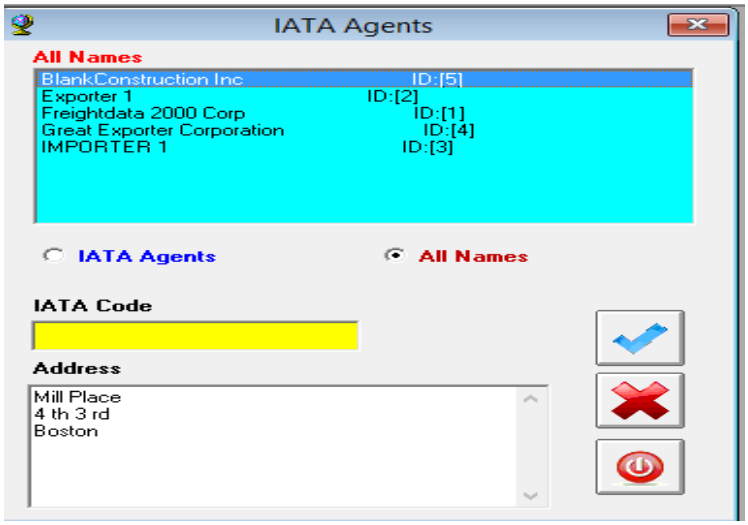
To delete a Carrier, click the name on the list box and click the (Delete) button.

IATA Codes

Accessed via the Set-up Menu, Air Cargo, by clicking on the IATA Codes Menu Item.

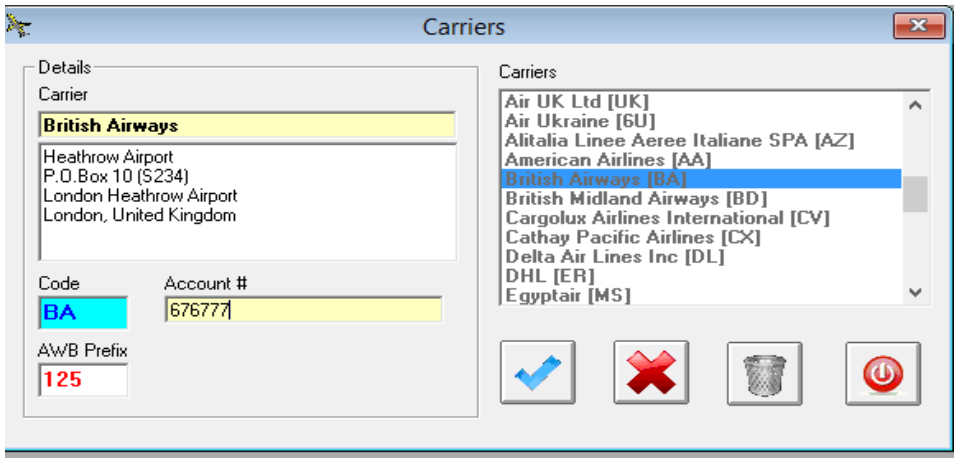
Any names entered through the Accounts set-up can become IATA agents with this window. The contents of the list box can be toggled with the IATA Agents and All Names option radio buttons. Once an IATA Code has been entered against a name, that company appears on the IATA agents' list.

In the usual manner, the Tick accepts the changes; the Cross cancels the change and the Open door exits from the window.



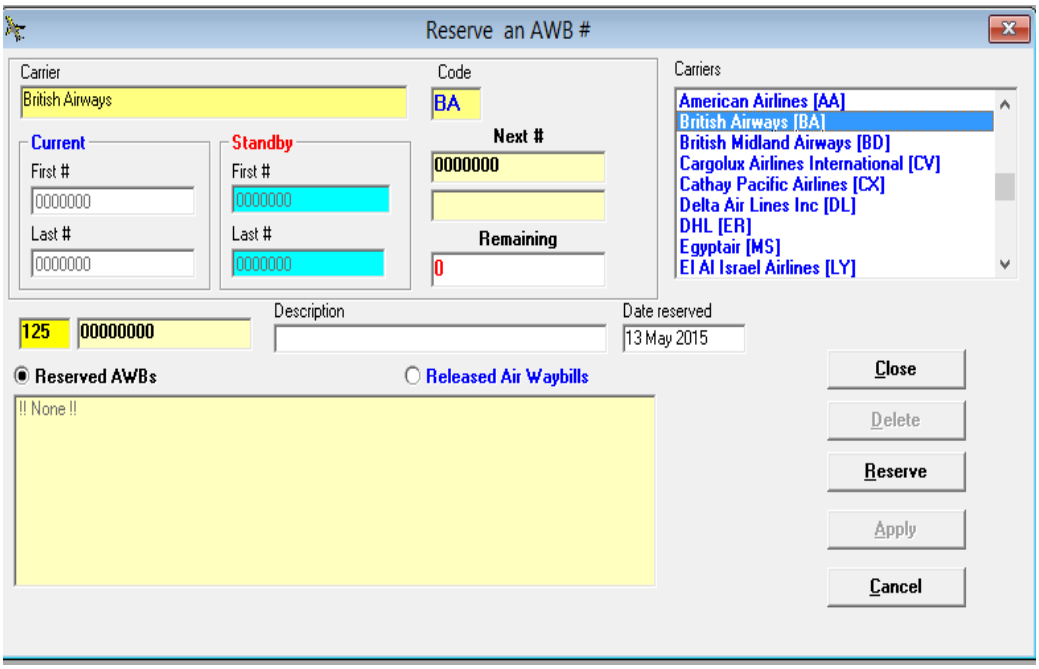
Air Waybill Numbers

Accessed via the Set-up Menu, Air Cargo, by clicking on the Air Waybill Numbers Menu Item.



Maintained by Carrier Code. Carriers must be first set-up via Set-up - Air Cargo - Carriers.
Select a Carrier from the list. Enter the first number and last numbers in the current range. The next available number to be used and remaining fields are automatically filled in. The maximum number in the range is 9,999,999. Waybill numbers to ensure Duplicates cannot take place. Changes are acceptable uses the Tick button or cancelled with the cross. The numbers are used the Standby range will automatically replace the Current range.
This can also take place before the current range is exhausted by pressing the button labelled **<< Transfer Standby.** The Standby range is set to zero after transfer has taken place. The standby range will be checked against the current range for Duplicates. Both ranges will be checked against Issued Air

Reserve Air Waybill Numbers



Accessed via the Set-up Menu, Air Cargo, by clicking on the Reserve Air Waybill Numbers Menu Item. To reserve an Air Waybill Number click on a Carrier in the list box to transfer the Carriers Name and Code to the relevant boxes. If a range of serial numbers exists for the carrier you will be able to reserve one. The Description box should contain a brief description of the freight you intend to transport. The date will automatically show as today's date. the Reserved Air waybill list below. The Cancel button clears all the fields allowing you to reserve a new Air Waybill.
The description of a reserved bill can be altered by highlighting the item in the list.

The Apply button is then used to save the change.

The Reserve button is used to reserve an AWB Number. Once you have reserved an Air Waybill, it will be listed in



Defaults

The Defaults window is used to set the criteria for checking Duplicate IATA and Airline Air Waybill Numbers. The minimum Period allowed is 12 Months.

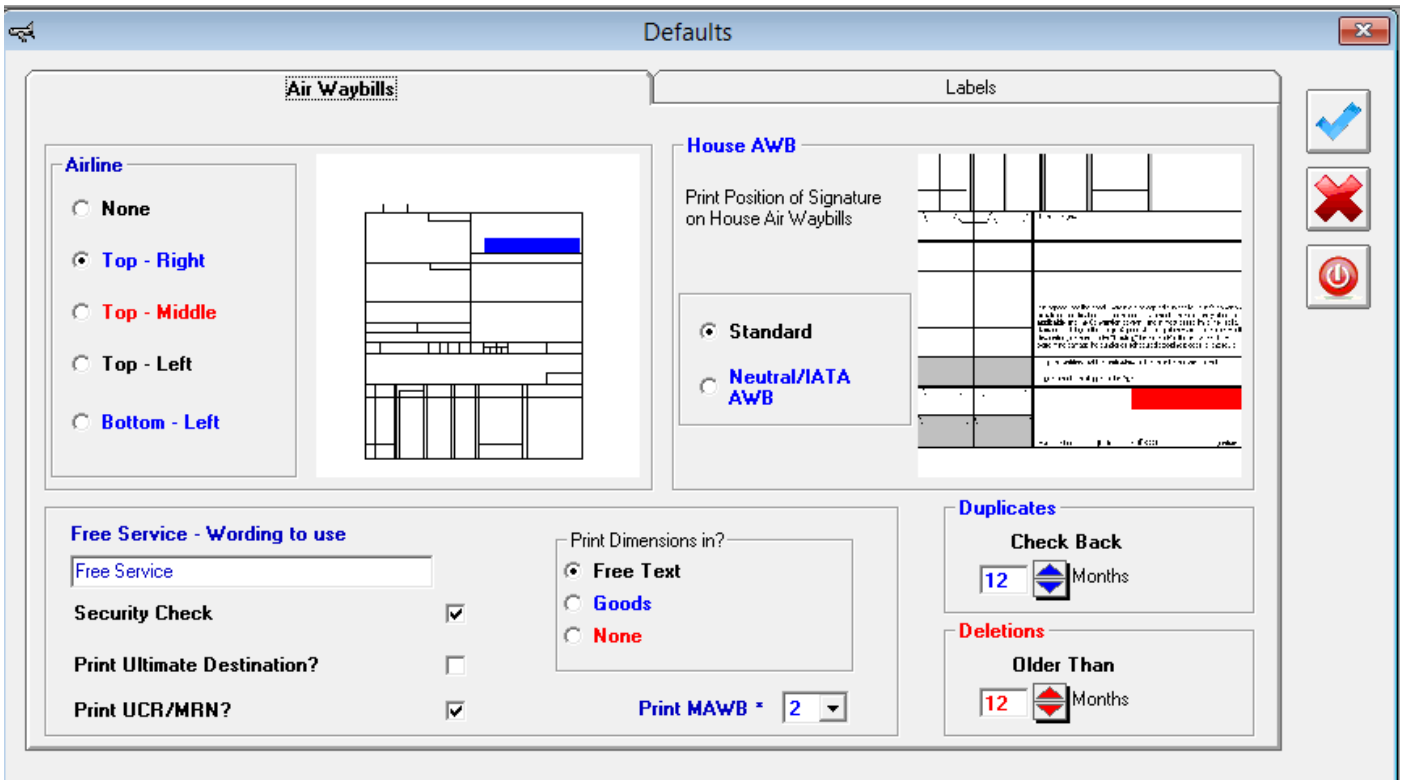
The same window is used to set the criteria for Deleting Air Waybills. Again the minimum period is 12 Months.

The Cancel button will restore the last stored criteria.
The Okay button will accept changes.

Defaults

Bar Code for Master Air waybill, Master Labels and House Label can be produced in this section.

To create the Bar code in the Master Air Waybill click the required radio button, "***Top right, Top Middle or Top Left***," for positioning, You will see on each choice, the Air Waybill will display the printing position. to be moved. "***None"*** will place a Bar code on any label.
Master Label & House Label, work in a similar way, but here you choose,
"Top or Both." You will see that the display for the label will change and move for printing with each position chosen.
"***None"*** will not place a Bar Code on any label.





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Rate Classes

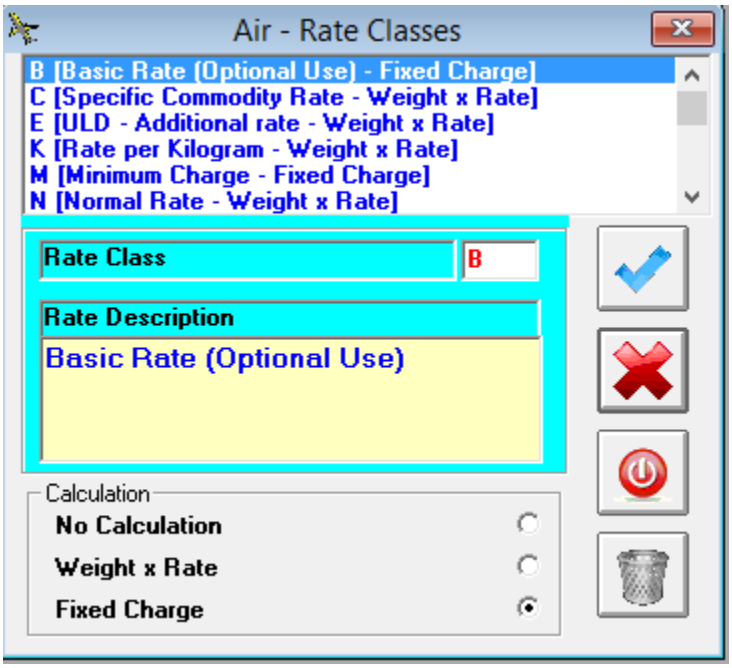
Accessed via the Set-up Menu, Air Cargo, by clicking on the Rate Classes Menu Item.

List of existing Rate Class codes. Click here to alter an existing code.

Rate Class codes are entered as a single Letter.

Description as per IATA Specification.

Choice of calculation to be performed.



The buttons on the right are the same as other set-up programs. Rate classes included are as per the current 1996 IATA specification. All codes can be altered or deleted and additional ones added.

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Other Charges Codes

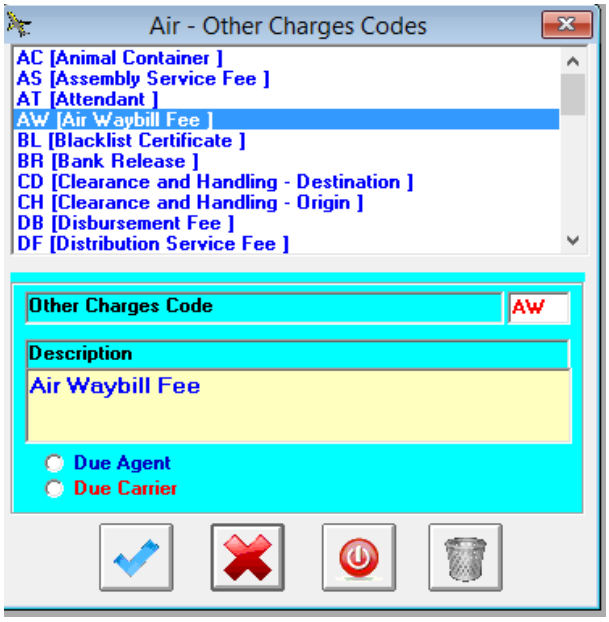
Accessed via the Set-up Menu, Air Cargo, by clicking on the Other Charges Codes Menu Item.

List of existing Other Charges codes. Click here to alter an existing code.

Other Charges codes are entered as two Characters.

Description as per IATA Specification.

Buttons for accepting, rejecting, exiting and deleting

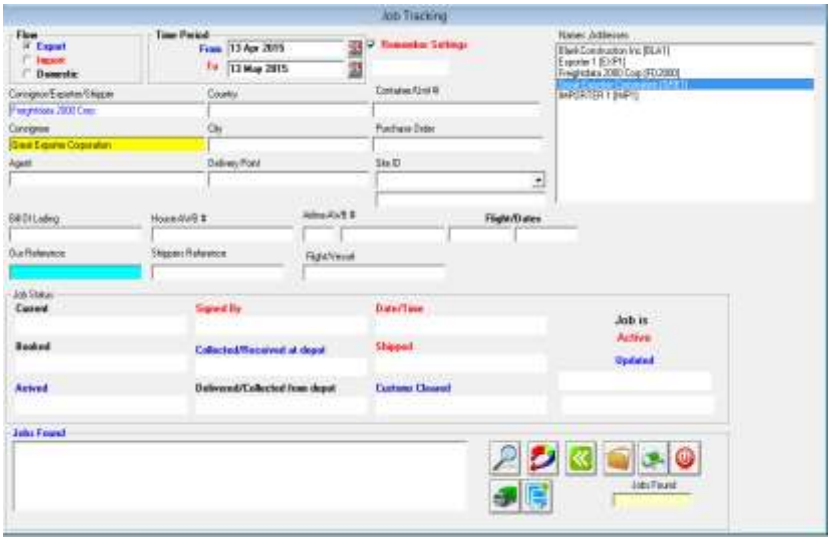


The buttons at the bottom are the same as other set-up programs. Other Charges codes included are as per the current 1996 IATA specification. All codes can be altered or deleted and additional ones added.

Tools Menu

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Job Tracking



Accessed via the Tools Menu by clicking on the

Job Tracking Menu Item.
This form allows you to search for References having entered in the search criteria.

The Search Criteria

Firstly, it should be noted that even the smallest of information would allow the job tracking to access your required cargo.

The more information you enter the more rapidly the program finds the files because it has more to search with.
Flow Click on Import, Export or domestic depending on which one you want to search
Delivery Point Click on the Delivery Point text box.

This will turn yellow and the list box on the right will display a list of Delivery Points. Click on a Delivery Point from the list box to transfer it to the Delivery Point text box.

Trailer Number: Enter into this field the Trailer Number that you want to search on.
Consignor/Exporter/Shipper Click on the Consignor/Exporter/Shipper text box. This will turn yellow and the list box on the right will display a list of Account Names. Click on an Account Name to transfer it to the Consignor/Exporter/Shipper text box.
Consignee: Click on the Consignee text box. This will turn yellow and the list box on the right will display a list of Account Names.
Agent: Click on an Account Name to transfer Agent Click on the Agent text box. This will turn yellow and the list box on the right will display a list of Account Names. Click on an Account Name to transfer it to the Agent text box.

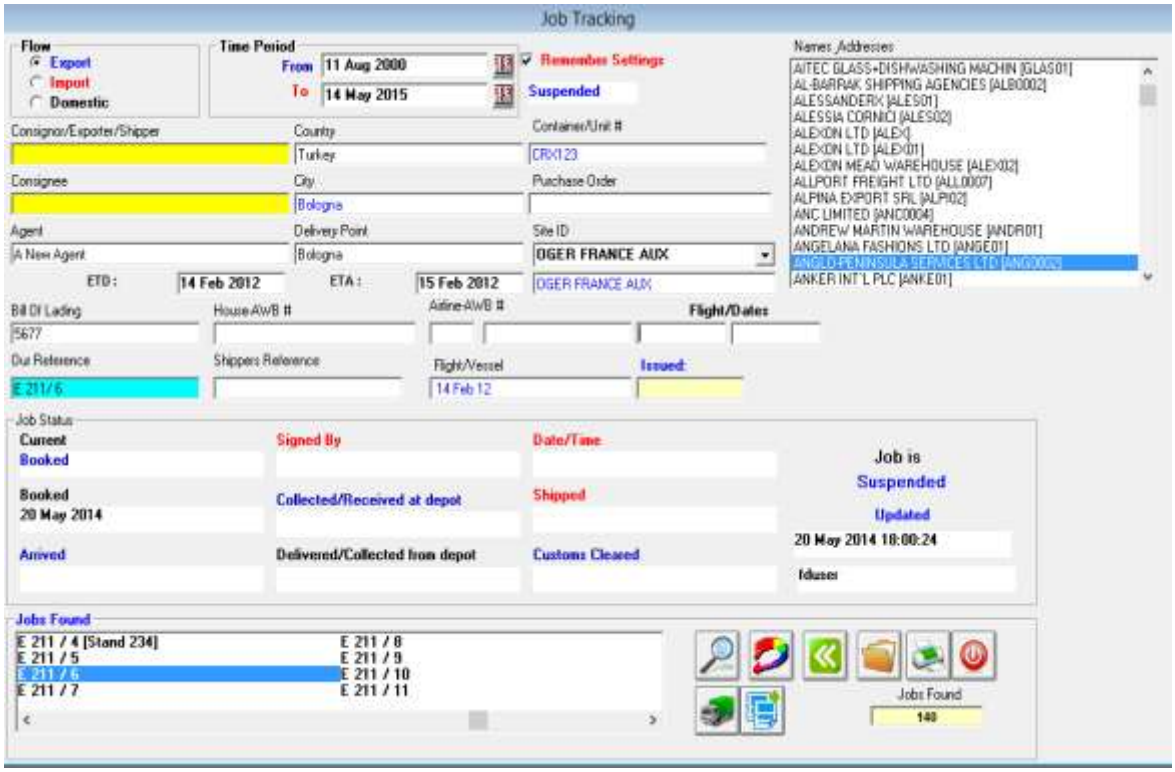
When the search is complete it will either say it hasn't found any References or it will list all the References that it found in the Jobs Found box.

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Remember Settings

If you want your Search criteria to be displayed when you next go into Job Tracking, then check this box. Next time you go back in your search criteria will be displayed.
Multiple Drop Loads: Previous Imports, Exports or Domestic consignments can be displayed by just clicking the ***Country***, then ***Town***. *For Example* ***Maidstone*** consignments will appear, then clear display and click **Manchester, these** drops will then appear in the display box
And so on.
NOTE: The list boxes will start at the setting you chose to remember, therefore if you chose the last item in the list and checked the remember settings box, the list box for that criteria will start at the end of the list. So if the list box was displaying countries, it would look like there was only one country in the list, in fact all the other countries are in the list, you just need to scroll up the list box to see them.



To display job details go to the Jobs Found list box. Select a reference. This will display the consignment details for the job you have selected. Note the buttons icons for ***Manifest, Open, Print, Repeat*** now light and are active. Job details therefore can be accessed either by clicking on the reference highlighted once and then choosing the appropriate button or double click the reference for the display to open the available job.

Job Tracking - Container Search.

To search for a container booked firstly confirm the date required and remember if you have "Remember Settings" and you do not wish this criteria click "Clear All". Then click search, then select the job in the Jobs Found list. Click "Once Only" to reveal the container status as shown in our example below.

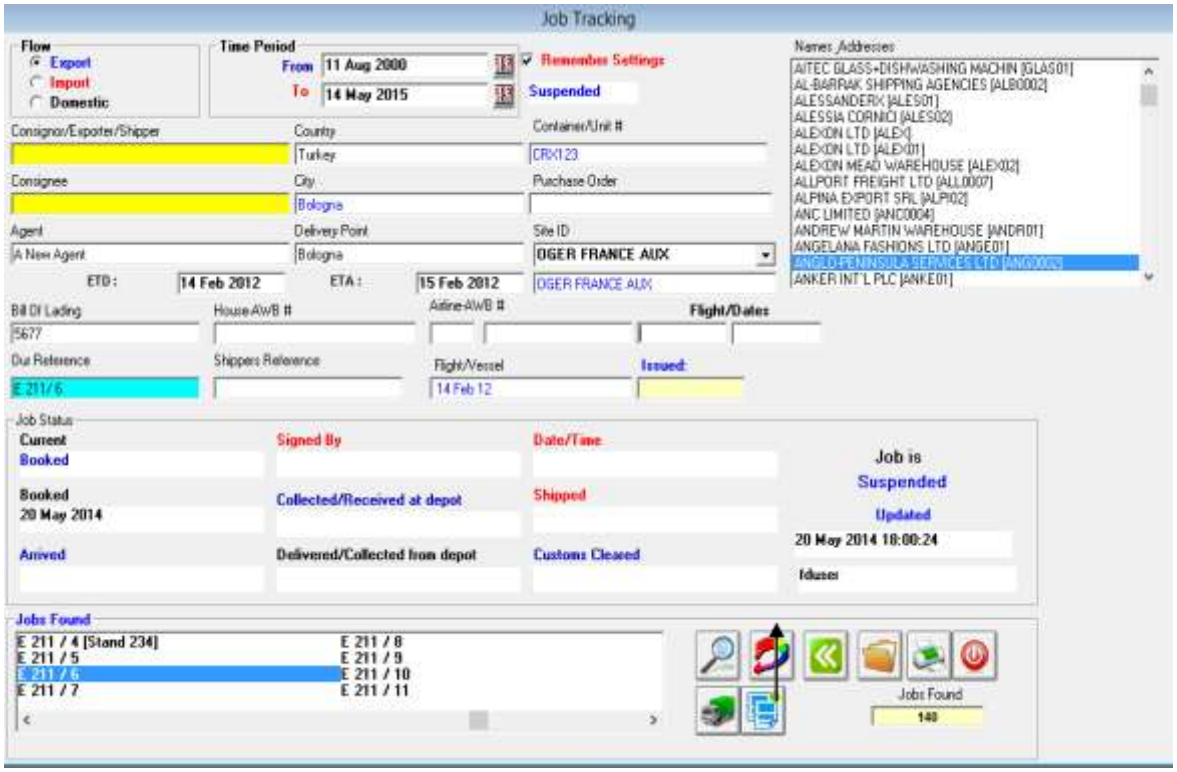
Repeat/Duplicate

To Repeat/Duplicate a consignment click the search button. You will see a list of references in the display box. Highlight by clicking the consignment you wish
Duplicate, then click the repeat key. You will see that the shipment as been Repeated in the list.

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Repeat/Duplicate – Continued.

After clicking the Repeat key, and selecting the shipment you wish to duplicate
You will see that the New Movement display confirms the next available reference
Which is the first position on a new movement.
The second display shows a list of existing movement to add to.
Then click on and highlight the shipment required to add this consignment to your consolidation.

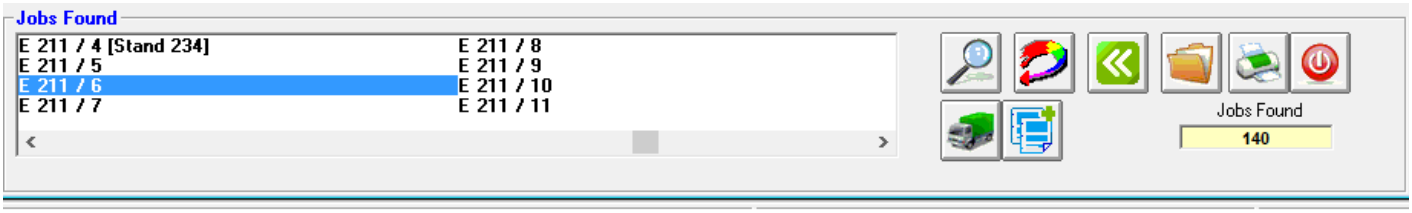


Open Button

This button will open the currently selected Job in the Jobs Found box.

Reference System:

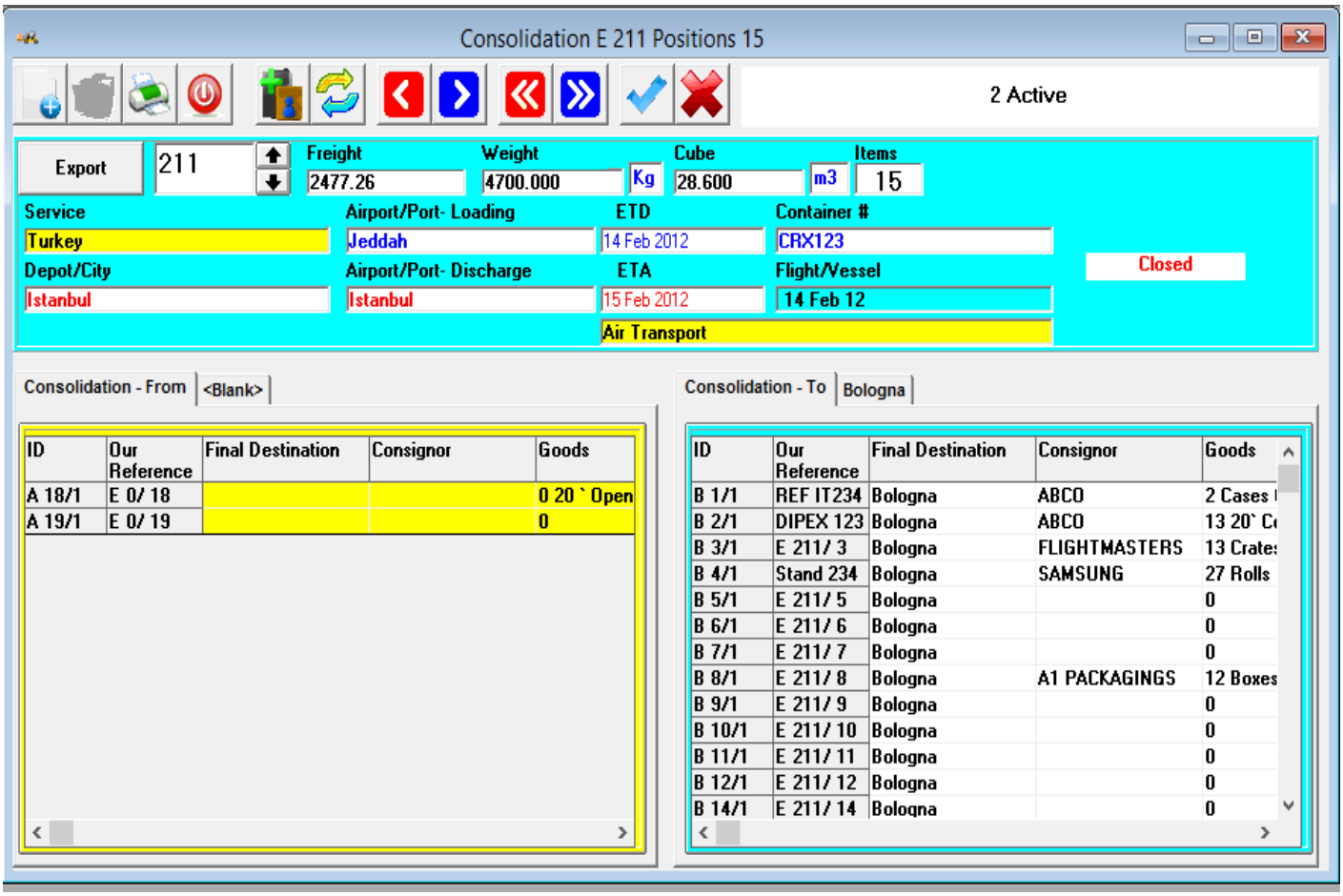
The Referencing system is created from the Flow, the Movement Number, and the
Position. **E.g. E6/13**
E represents Exports. Other possibilities are I for Imports and N for Neither.
Neither job is designed for use by Couriers and Road Hauliers.
198 are the Movement Number. The 198th Movement created for Exports.



6 the Position. The six position on the 211th export trailer.

Items do not appear as part of the reference.
In theory, 2,147,483,647 Movements may be booked on each Flow.
32,767 positions can be booked on each Movement.
99 items can be booked on each position.

Manifest **/consolidation**



The Manifest shows the position details for each movement, and the items on each position. The Tabs

signify each multiple drop or delivery to be carried out in this consolidation. By clicking on each tab you can individually display the required part of the consolidation. Click the arrows adjacent to the Movement number at the top of the screen to change the Movement number, or change the Movement Number by typing directly into the

Change Positions within a consolidation/

Click the required job you wish to change and then within the same Manifest, Then Click on the Toolbar and pick the Up or Down arrow.

The shipment will move up or down, one space at a time until it is in the required position. consolidation notes provides the same option as Shipment notes except that it refers to the whole of the consolidation rather then an individual shipment and prints as a general comment on the Manifest print. Requires the New Position and Click the New Position button

Manifest Toolbar

Add a New Position to a Movement

To Add a New Position to a Movement/ Consolidation consolidation

Enter the groupage/Manifest window by clicking on the Tools Menu item and then on Manifest or directly from the groupage/manifest screen.
An additional job for a groupage may be created with the **NEW** position is appended to the movement, and the new job is Movement Box

Delete a Position from a Movement

Remember to Click on the position number that you wish to delete to enable the toolbar.
Enter the Manifest window. Display the appropriate Movement. Choose the position to delete.
Click on the **DELETE**

17

4



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Manifest Toolbar

Edit a Position in a Movement

To open and examine a shipment, double click on the shipment.

If you wish to print the groupage Manifest, click on the Printer ICON within the **consolidation screen.**

You can then print the Manifest from the Printer “ICON” on the panel. You can also select the Printer type and selected fonts including the Logo Print.

New Position - Allocate Cargo

In the consolidation screen you will see that in our earlier example all the reference numbers run concurrently from E123/1 to 123/5 without a break.
However, if a customer cancels one shipment then for example E123/4 could be missing from the sequence. This is also true when cargo is reallocated from other departments or countries and again breaks this sequence. We how below this example and how to re-establish the continuous numbers.

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New Position - Allocate Cargo

Click the tool from the toolbar above. The window opposite will appear accept position 4 and then enter your new cargo using the old cancelled number. This will then re-schedule your sequence of numbers.



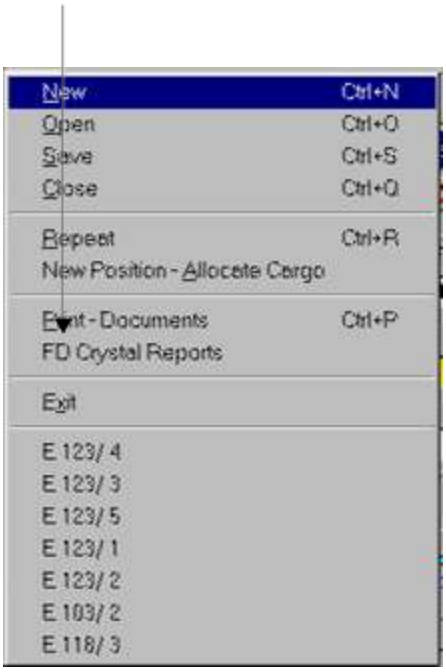


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New Position - Allocate Cargo

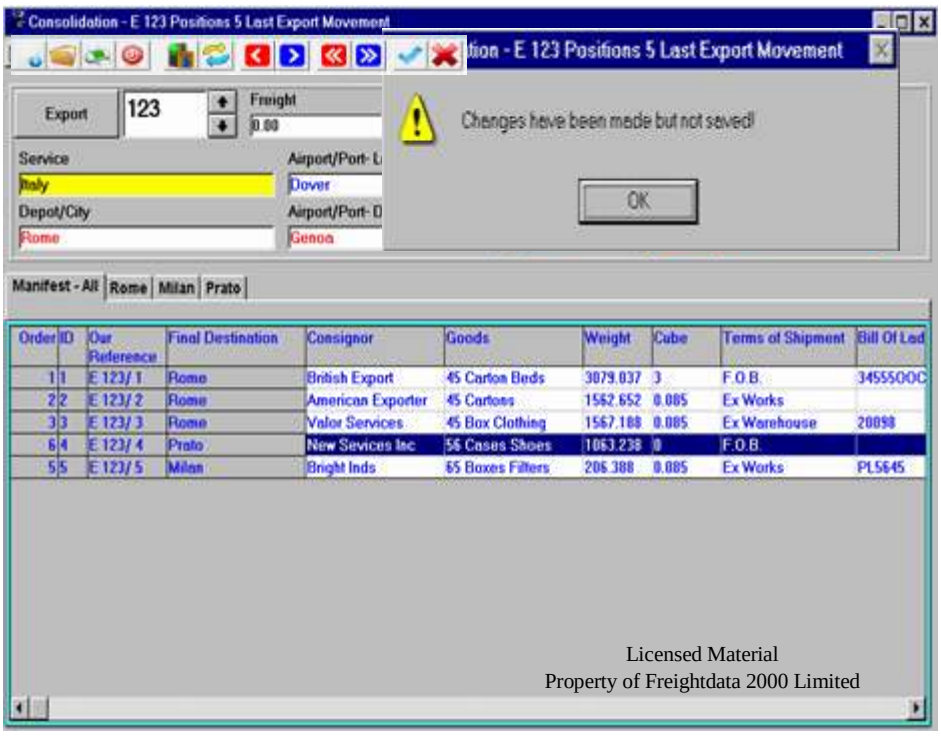
. Click the New Position –Allocate option here.

Access to this program can also be found in the file menu as shown here.



New Position - Allocate Cargo

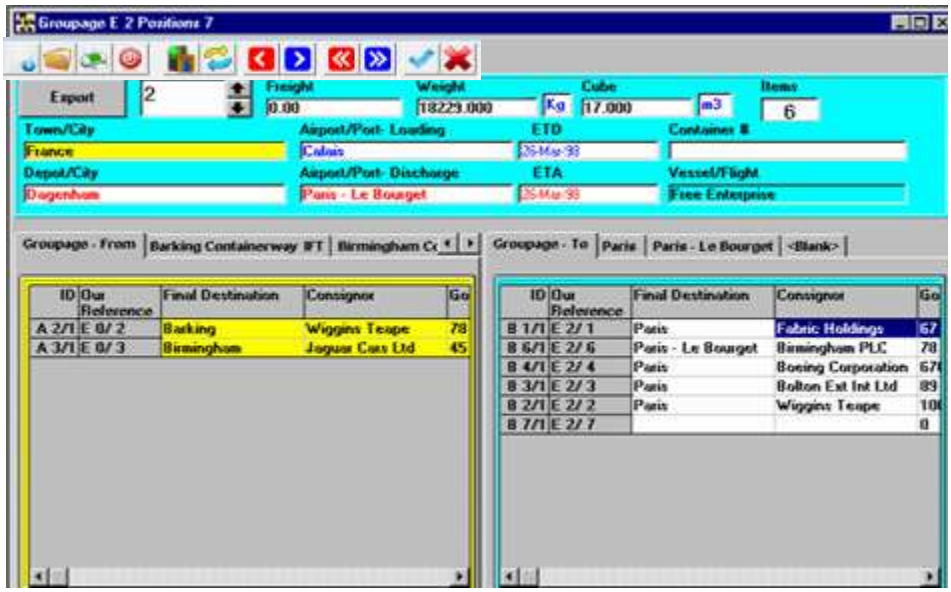
Now you have allocated this new cargo you can see that everything is now in sequence. Note: If cargo already has charging information entered, it cannot be changed. You will be provided with a warning screen.



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Allocate Cargo



Shipments that await a destination and *stored* can be moved from this option. The screen above shows on the left the cargo awaiting allocation and on the right existing cargo listed, you can move either non-allocated shipments “0” to the E 1/1 or vice-versa by clicking on the shipment and then dragging the required shipment to either side. You can change the manifest, which in this example shows Export “2” and swop non-allocated cargo to any other manifest you require. *Note: You cannot mix destinations on the same destination Tab : IE Alicante/Dusseldorf. The Chevrons shown here will allow a manual swop and show the current status of allocated and unallocated cargo.* The save button will save & confirm the Swop of the cargo. You will notice that a change in colors from Blue to Yellow happens when the mouse is moved from one side of the display boxes to the other. This denotes on which side you are displaying the information on the display boxes.

Allocate Cargo

If your mouse gets locked in the Grid then simply CNTL/Alt Delete and then cancel **does not** click shutdown. This is a feature beyond our control, but with this action, it is easily remedied.

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Allocate Cargo…. Continued.



If you try and allocate cargo before a active shipment is saved, the following warning will appear and require you to take action to save the current working consignment.



Simply while in the Allocate Cargo screen, click the file option and then **SAVE.** You will then be able to drag the cargo as mentioned earlier.



Cancel Button



cutting and pasting a further toolbar button is enabled. This is the **CANCEL button.**

When

Pressing this when the **PASTE** button is enabled will cancel the process and allow the user to restart by choosing another position to **DELETE, CUT** or **OPEN** or to simply add a **NEW** Position.

Invoice Inquiry

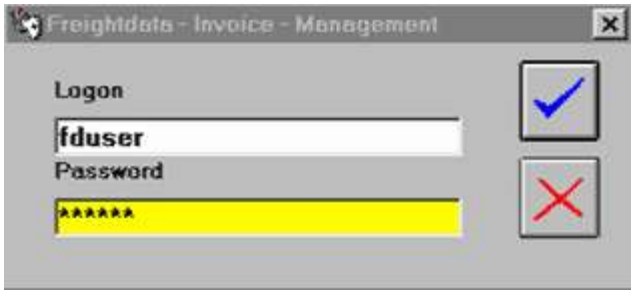


Accessed via the Tools Menu by clicking on the Invoice Enquiry Item.

This option allows you to see a summary of the Invoices and Credit notes for each Account. You can select an account by clicking on the Account name in the list box. (For quick searching, type the first few letters of an Account Name into the text box above the list.)
This fills in the Date, Number and Value fields for Invoices and Credit notes associated with the Selected account. If nothing is displayed, then there are no Invoices or Credit notes for that Account.

If you click on either the Date, Number or Value field for a particular Invoice or Credit note then the fields for Exchange Rate, Terms and Reference are filled in for that individual Invoice or Credit Note. Once an Invoice or Credit note has been selected you can print it by clicking the Print button for Plain or Pre Printed.

Access to the enquiry program is via a logon & password gate;



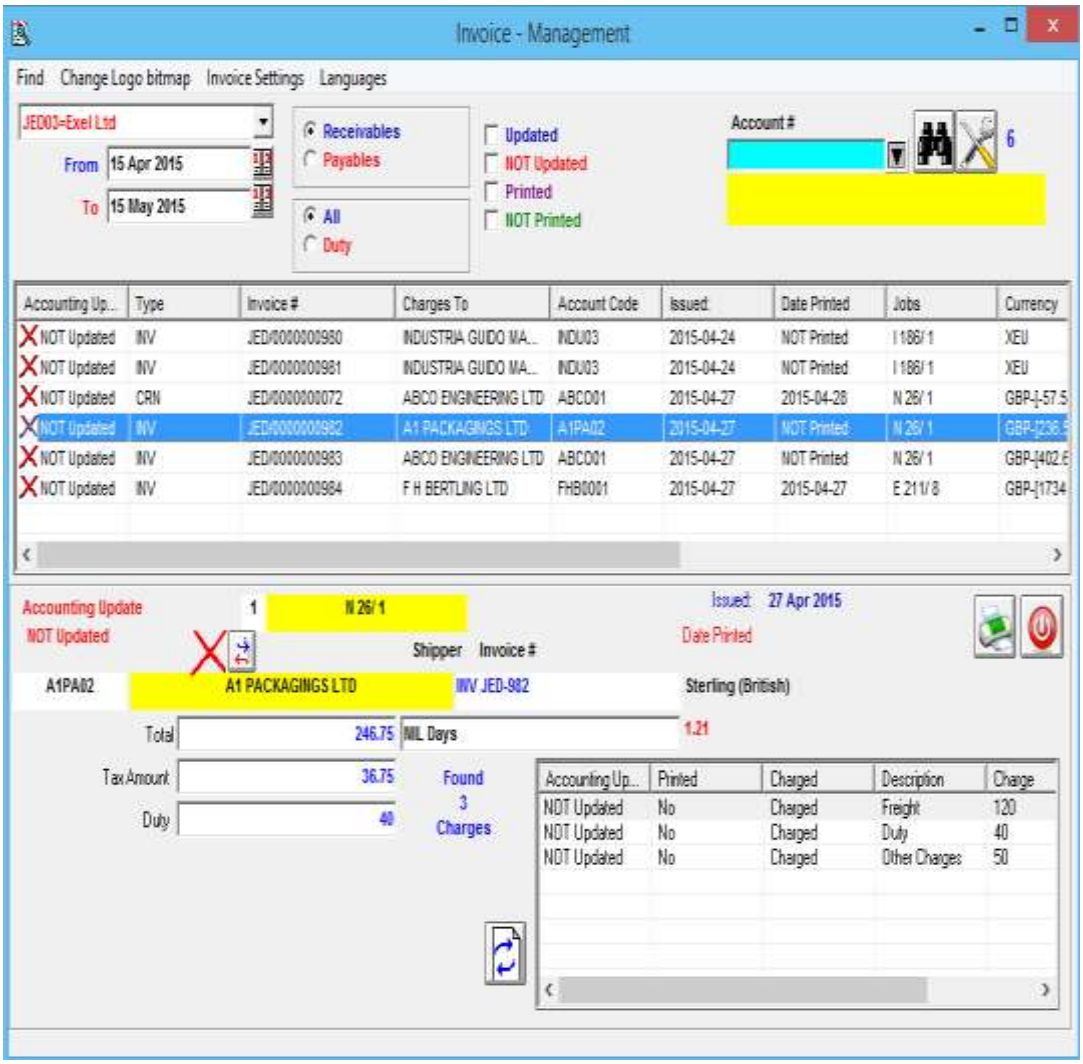
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Invoice Enquiry…Continued

You have two ways to find the account you are looking for one “Click “ the accounts pull down button on the top right this lists all the account name you wish to view. Choose a customer then click the binoculars and view the account & the Invoice information for that customer. Or two, you can just type the Invoice number. Remember to enter the date periods “***From*** and ***To***” by using the calendar. Click into the date to bring this calendar forward.

For a general view check the binoculars and view the invoices. The status of each invoice is displayed from left to right below if the invoices have been updated, the type of invoice, charges to and so on. Use the slide bar option to see more options available. You can choose the criteria of the search by clicking the radio buttons in the middle of the window.

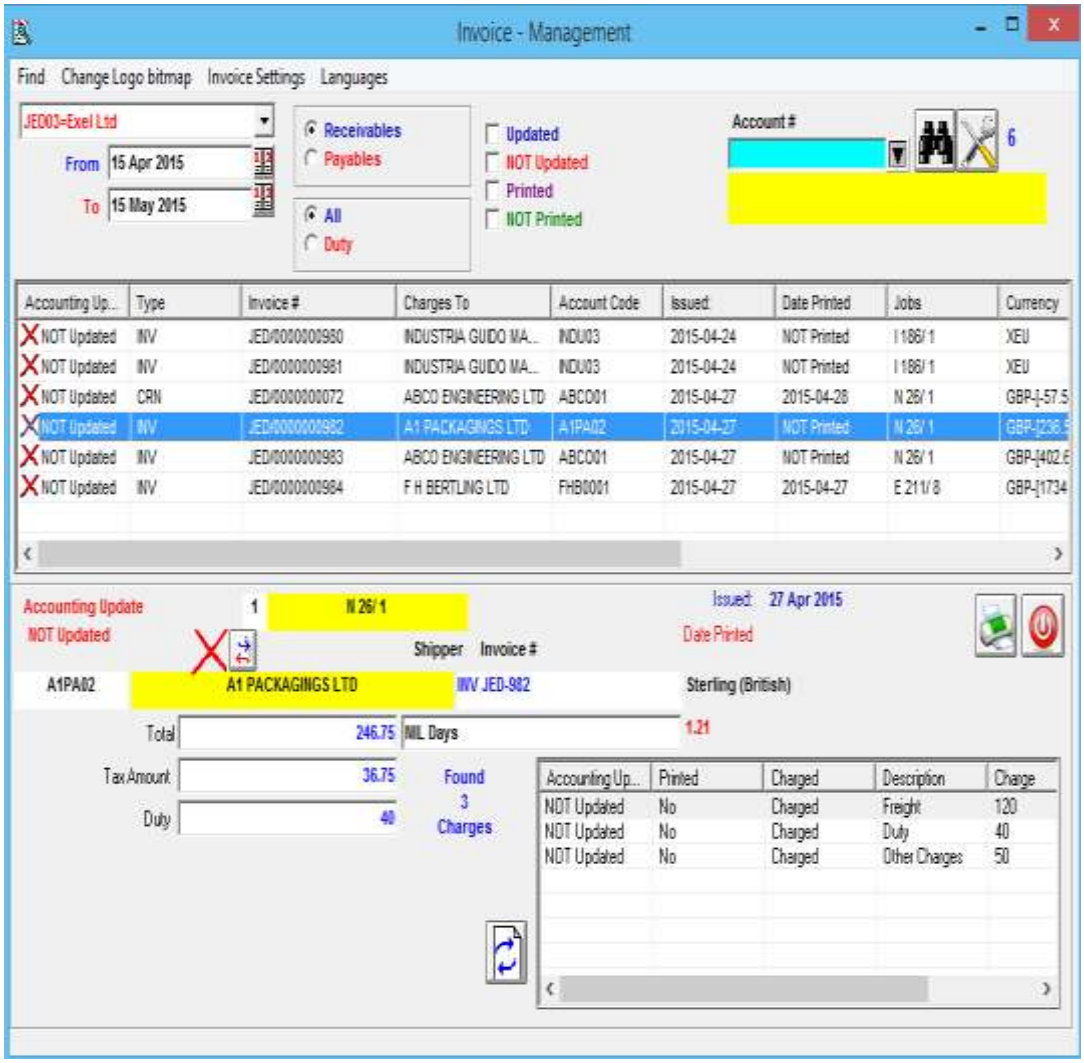




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Invoice Enquiry…Continued

Double click the invoice you wish to have more details on and the window will add extra features as in the example below. An "X" in the display acts as a warning to notify you that an accounting update has not occurred.
The display in the bottom left of the window shows from left to right; Account Updated, If printed, Charged, Description & Tax Amount.



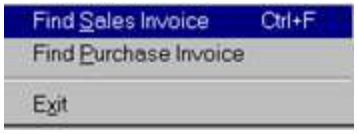
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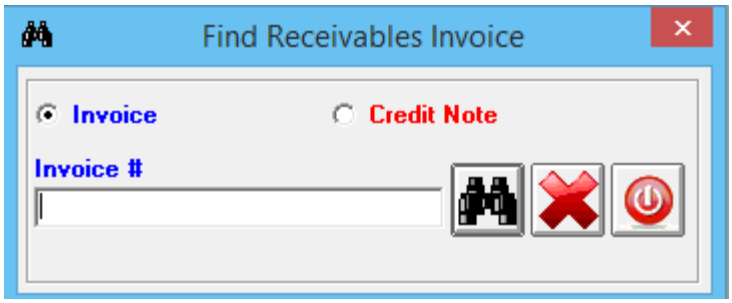
Invoice Enquiry…Continued

To find an invoice directly without going through the general searches on the previous pages. Click Find Sale, Purchase Invoice or Credit Notes. When you have entered the sales or Purchase Invoice “Click” the Binoculars and you will be displayed the required Invoice with its history by double clicking on the grey invoice line. To re-print an Invoice click the printer ICON. And you will see the option to either print your logo for Standard plain paper Invoice or for Pre-printed. You can adjust margins, although this should be done with care. Choose either on the left pre-printed or printed on the left.

To re-print an Invoice click the printer ICON. And you will see the option to either print your logo for Standard plain paper Invoice or for Pre-printed. You can adjust margins, although this should be done with care. Choose either on the left pre-printed or printed on the left.

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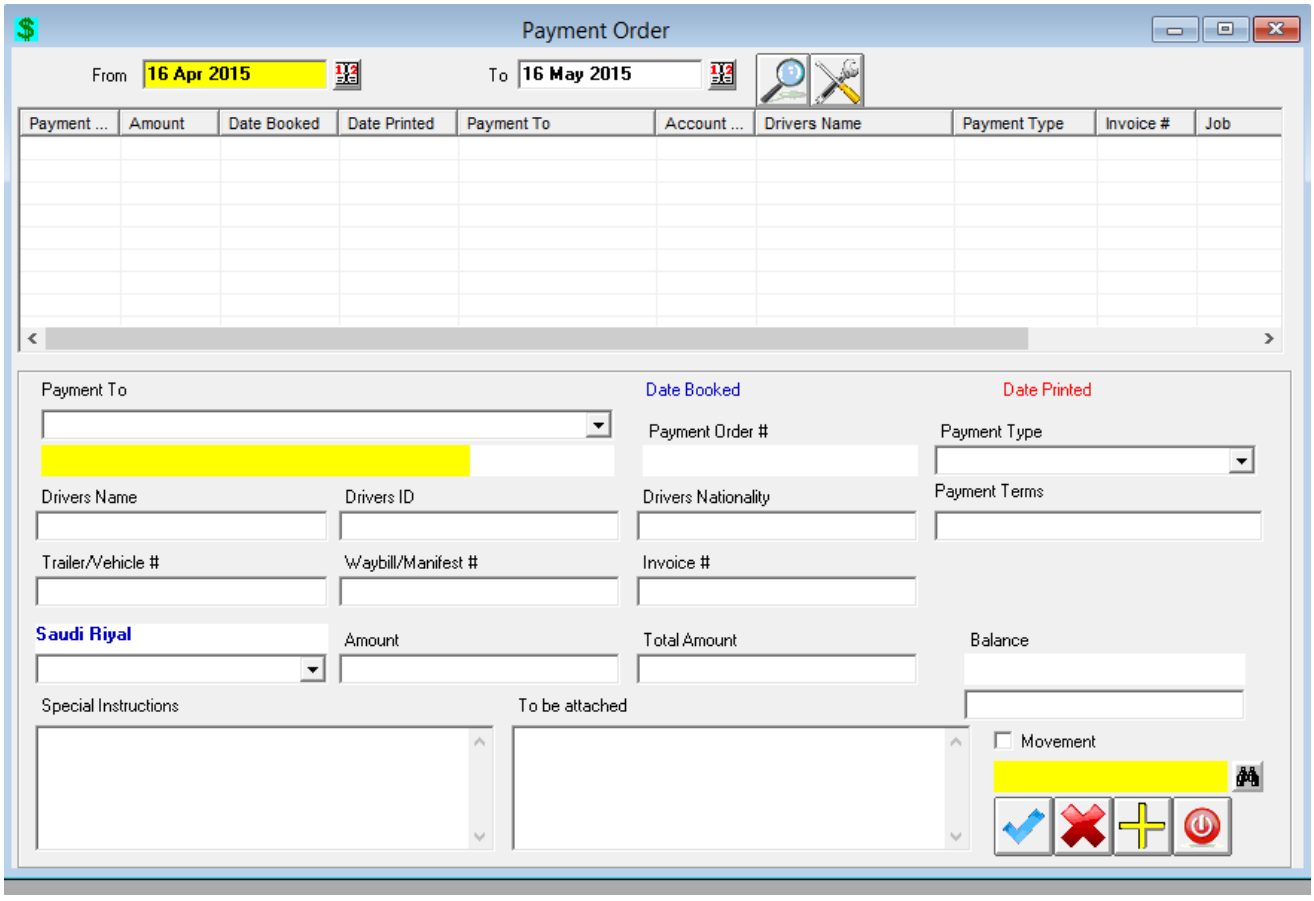




Payment Order

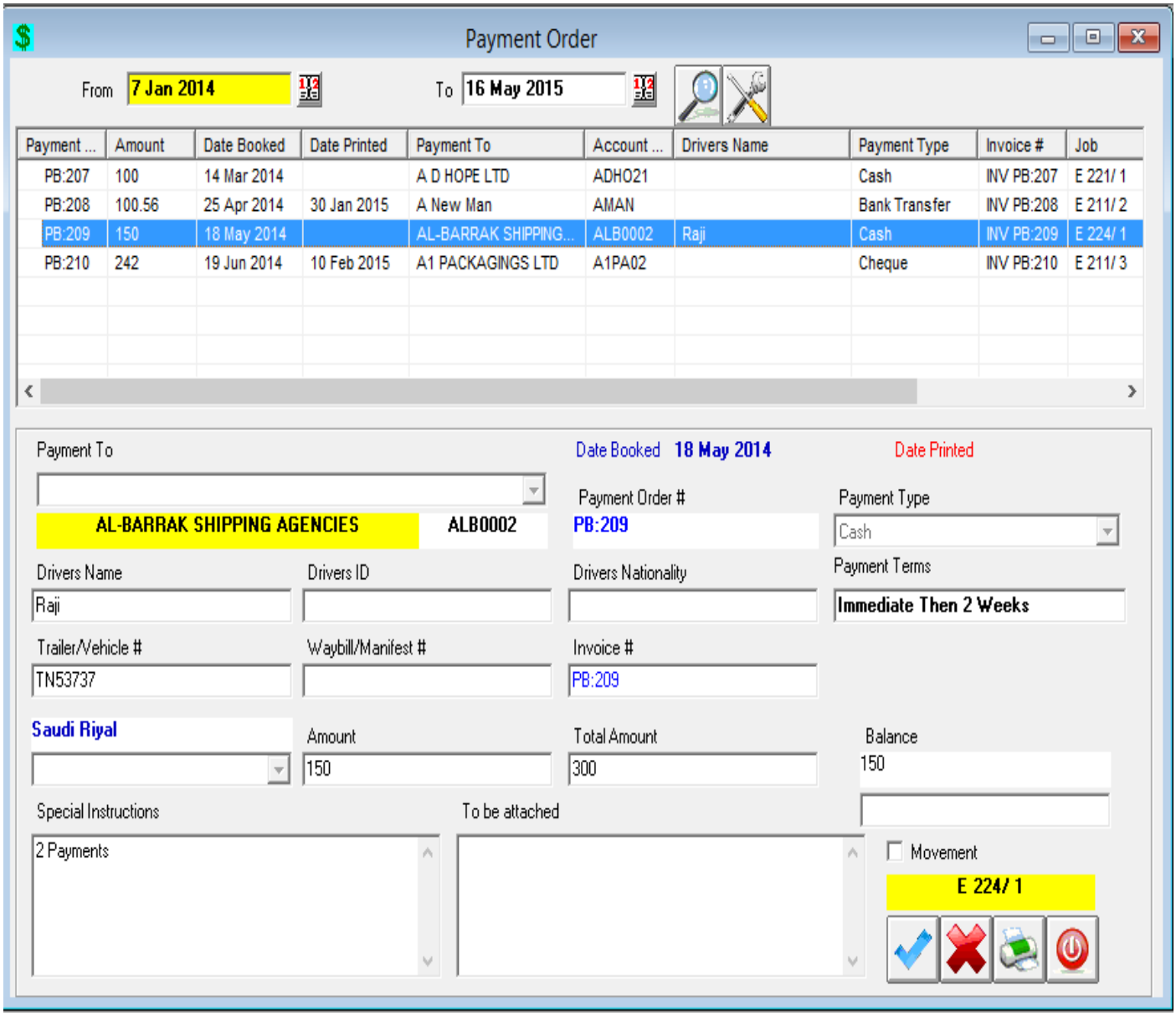
To allow for advance payments for shipments which can be included in the job costing, the user can enter here payments made against shipments.
Below we show this allocation-taking place and example 2 shows the options to allocate the payment against a consignment.

To allocate a new payment order click the + button. On the next page you will see the results of this action.



Payment Order… Continued

Now highlight the reference you wish to book the payment order to by double clicking it. You will see that this is then transferred to main Payment Order screen.

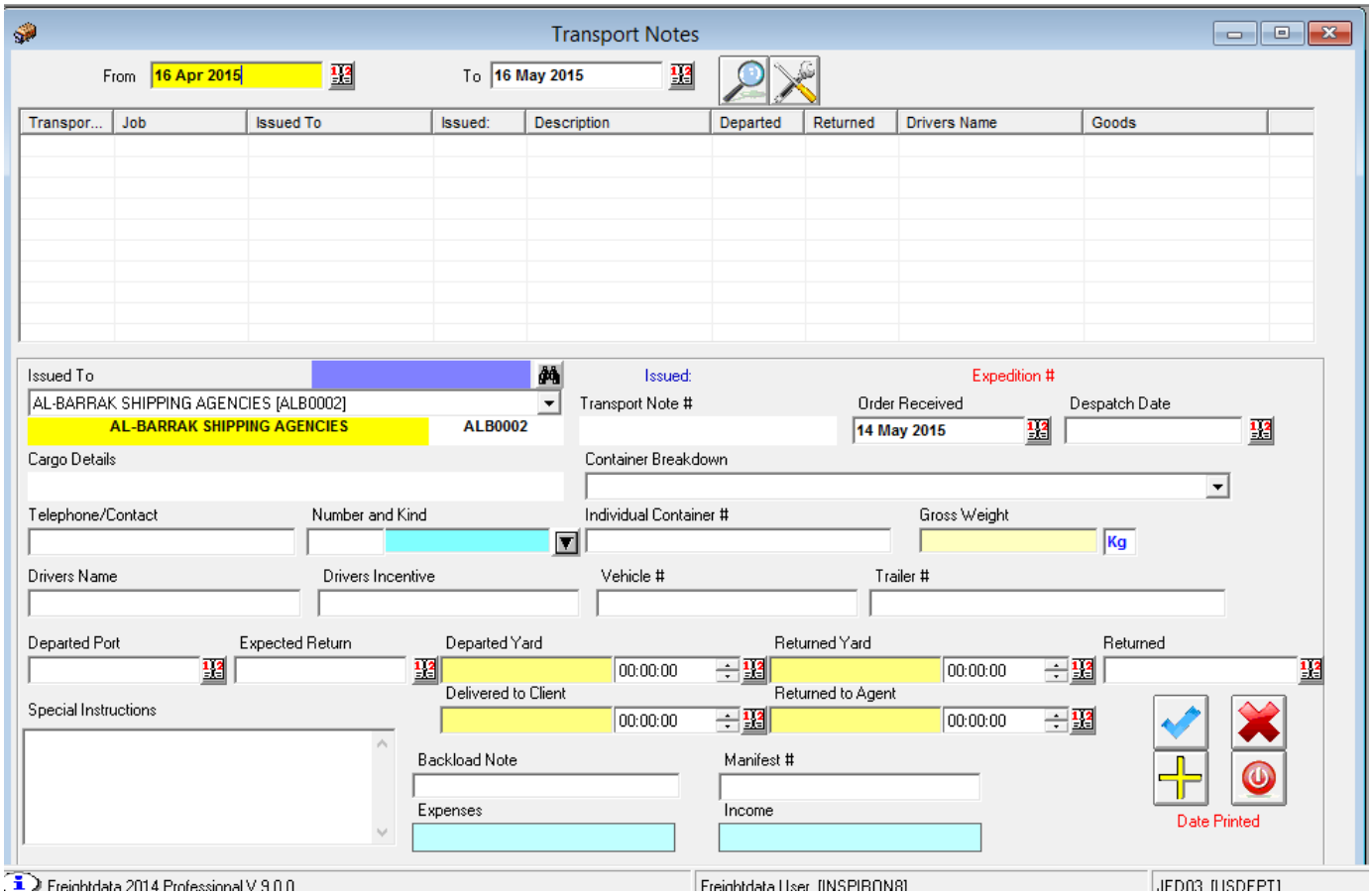


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Transport Note

Can be found in the tool menu.

Here you can complete the details of your transport note to include extensive details including container delivery and pick-up times.
Start by finding a shipment you have completed first by clicking the binoculars here on Fig 1. Then from the fig 2 Choose a date or range of dates then click the search button and then the shipment you wish to add a transport note by double clicking the shipment required.



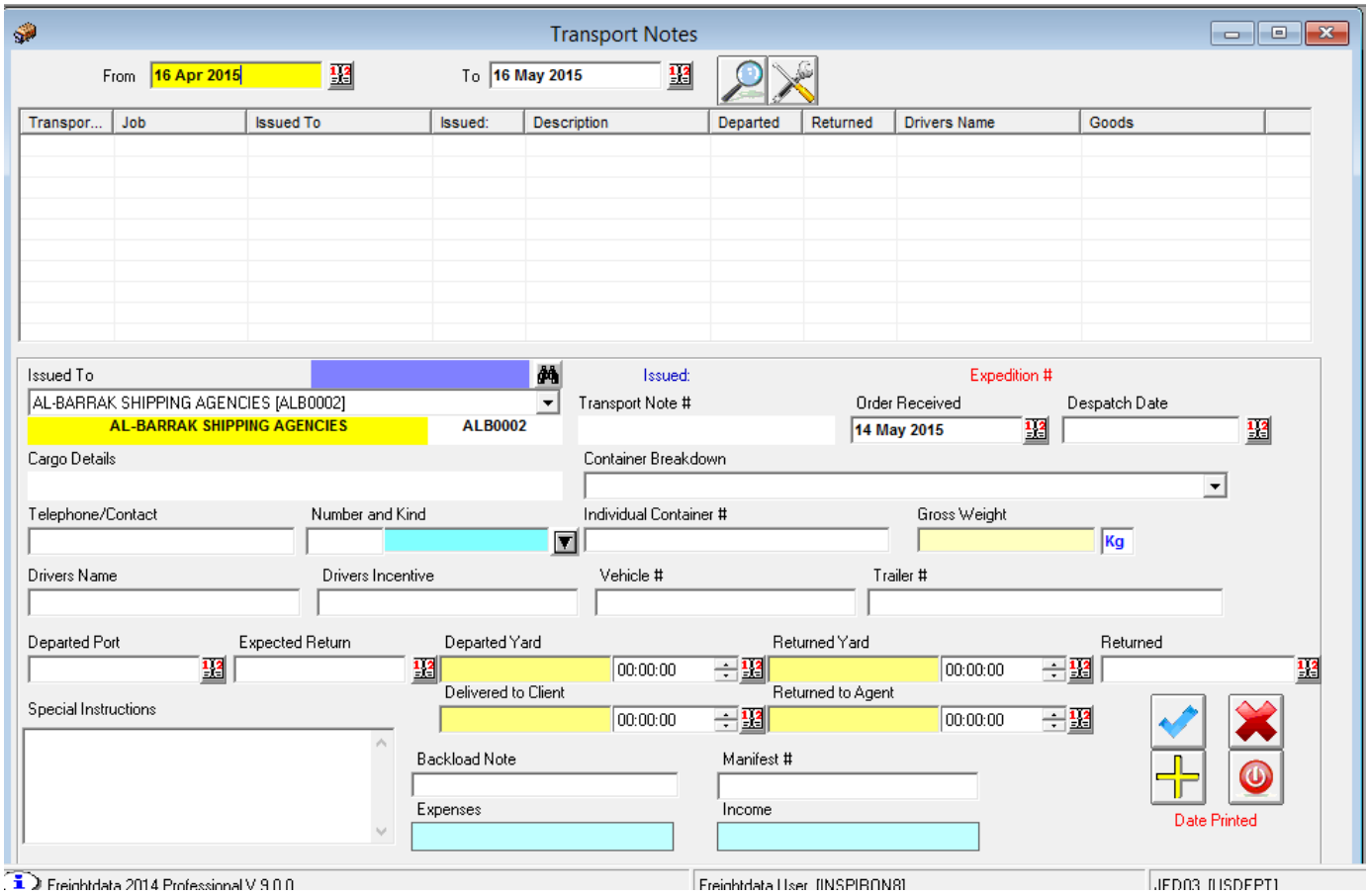
Freightdata 2000

Transport Note –continued.

Now start with the issued name, then number and kind of container or other mode of transport. Next the telephone contact and then the drivers name.

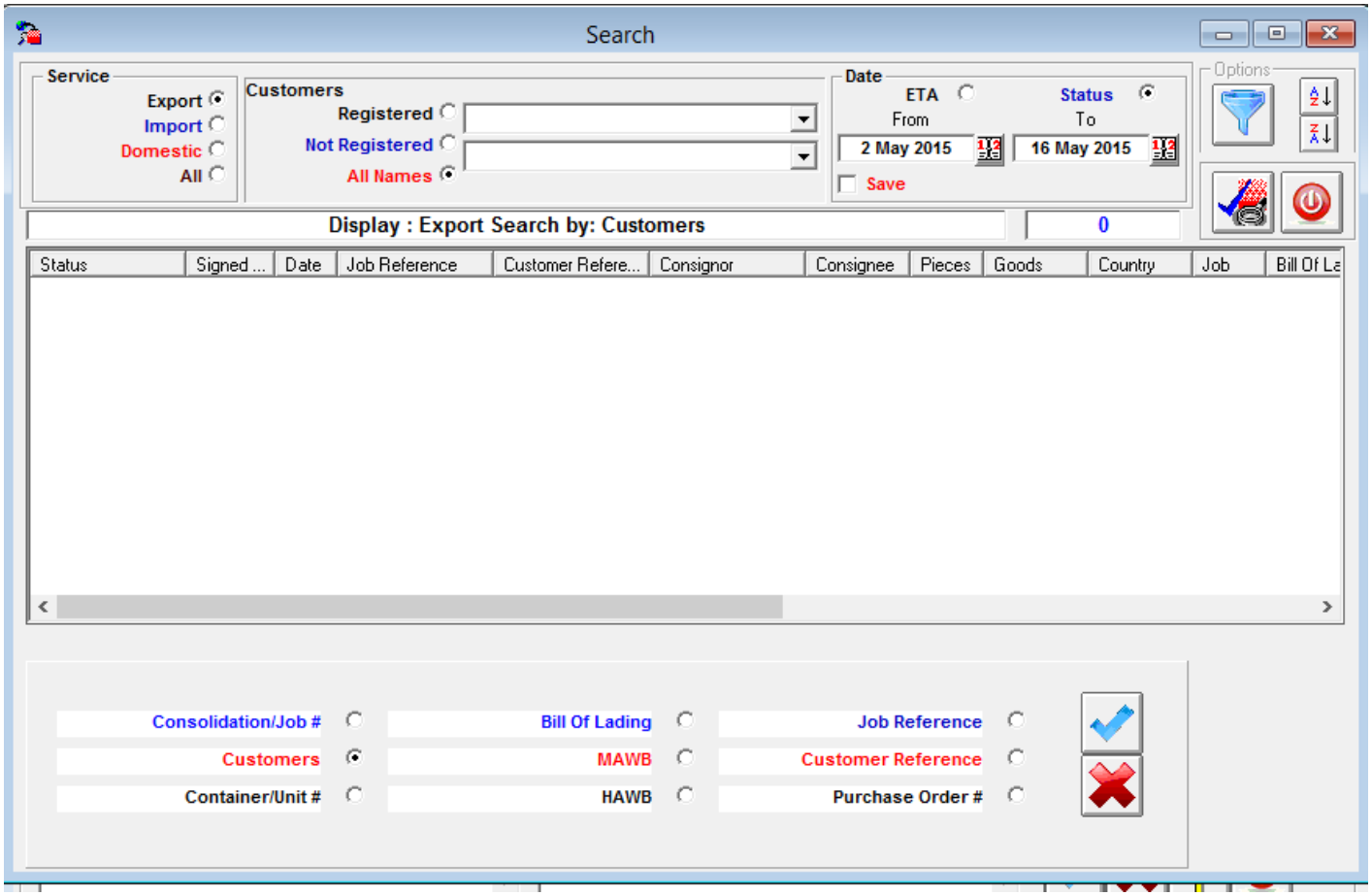
You may wish to pay a bonus or drivers incentive, complete this next.
Now complete the individual container number and the gross weight.
Next click in the yellow space for dates for departed port and the return of the container. Follow with the date and time the container departed from the yard and the other options provided.

If you click into the blue area of the expense option you will be able to enter costs for incoming and outgoing expenses. You will see that the details you have entered will appear in the top of the grid below. These grids with each heading can listed for your own choice by clicking on each type. You can also export this as a CSV file with the tool next to the search “Icon”. When you have completed each transport note click the check button and choose the new button below if you wish to add new transport notes.



Transport Note –continued.

Below is an option search provides an extra search including Consolidation, Customs, Container Unit, ,Bill of Lading, Master Air waybill, House Air waybill, Job Reference, Customer Reference, Purchase Order.



WEB SITE:

Freightdata **has its own** Web Site **http://www.freightdata.com** to link into associated products including AIRLINE and SHIPPING information. It links directly to 200 Airlines and the Ocean Wide Web Site. Click on the ICON and providing you have a Modem & Internet Provider account, Freightdata's on-line! (Contact your Dealer for more Internet information including Web accounts and Communication equipment).

Consolidated House

AWB: See Air Freight Section page 39

Print Clauses

Print Clauses are accessed via the Set-up Menu and the Print Clause menu item.
Print Clauses allow the user to add comments or messages to any of the listed Prints.

To Set-up a Print:

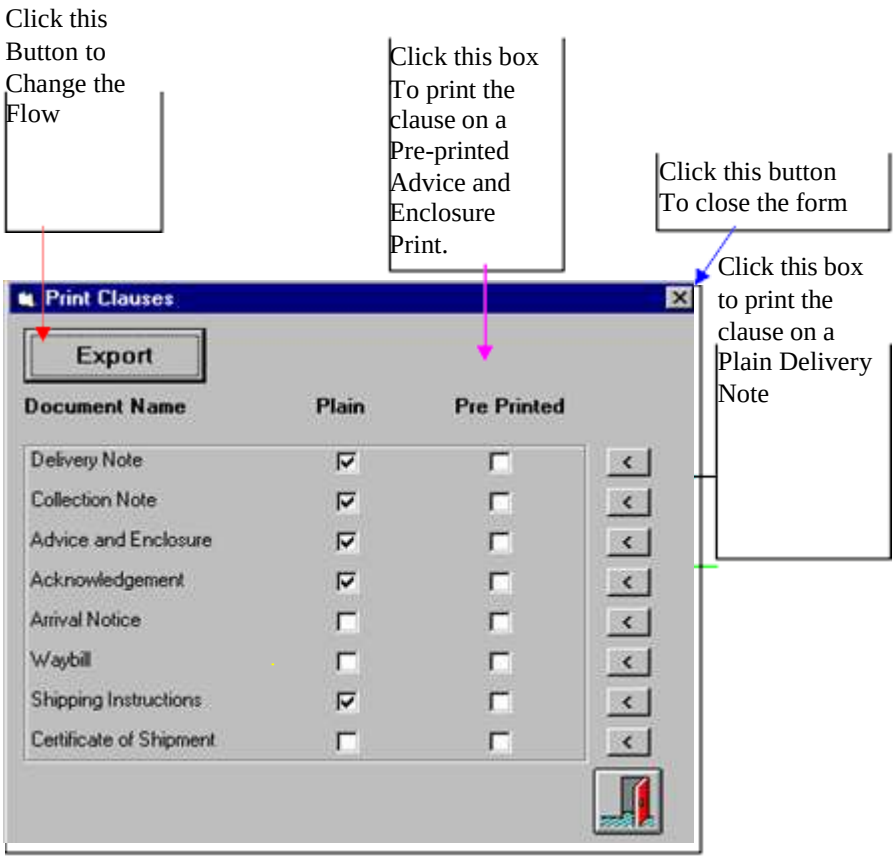
ClauseSelect the flow for the Print(s) that you want to add Clauses to. This is done by clicking the button in the top left of the form until the flow that you desire is displayed on the button. Press the button with the left pointing arrow next to the document that you want to add a clause to. A text box will be displayed.
In the text box type in your clause, when finished press the same button, now with a right pointing arrow, to save the text. Press the OK button at the bottom of the form to close the form.

To Print a Clause on a

Document **Besides each clause are two check boxes, for the Clause to appear on a Pre Printed** appear on a Plain document check the box under the Plain column for each document you want a clause to appear on and click **document. Check the box under the** Pre Printed column for each document you want a clause to appear on. For the clause to

Print Clauses form

OK. When you now go to print the document you added a clause to, the clause will appear at the bottom of the print.



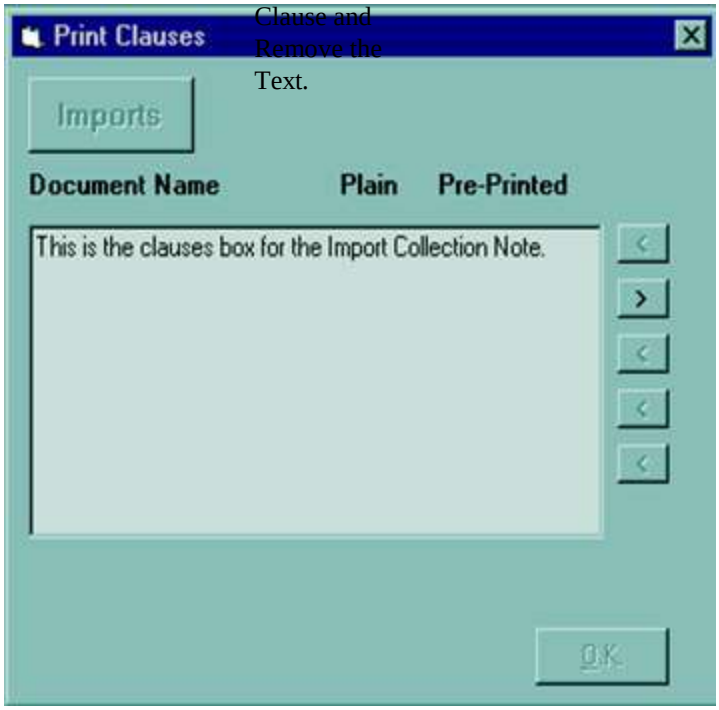
Print Clauses - Continued…

Click this button to
Enter in a clause for
Shipping Instructions
Print

Clauses form Showing text being entered in.

Text box
To type
Clause
Into

Click the
Same button
To save the
Clause and
Remove the
Text.



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Tariff

Accessed via the Tools Menu by clicking on the Tariff Menu Item
This starts up the Tariff Application (Freightdata Professional Only)

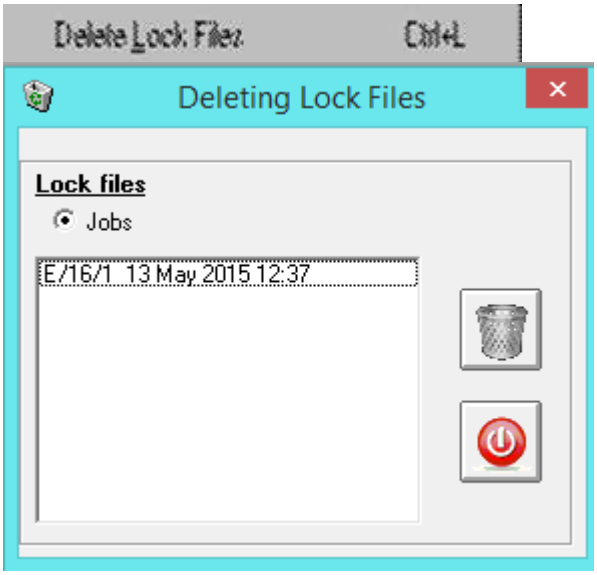
AVAILABLE AS EXTRA PRODUCT

Delete Lock Files

If for any reason your computer failed or on a multi-user system another user has opened this same reference.



If it is caused by abnormal function of your computer you will need to access the TOOLS menu and click – Delete Lock Files.



To delete the file click" the reference And "Click" the waste bin. You will then be able to access the reference.

Metric/Imperial – Conversions

In the Setup Menu, click Metric/Imperial – Conversions.
This option allows you to set specific criteria a to chargeable Weight.
You can mix LBS and Kilos as well as control domestic or international conversions. These conversations will appear as an option when cargo is being entered in the Job details goods section of your software. You can choose from Weight, Cube, Mileage, and Fluids.

You also have recommend calculations built into the conversions as default, should you wish to use the existing calculator guide

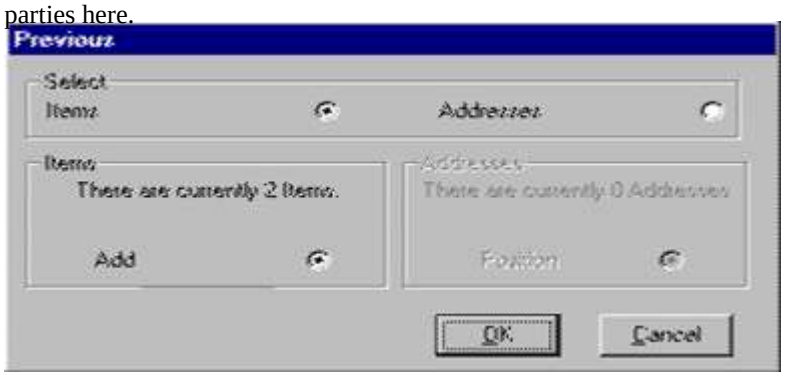
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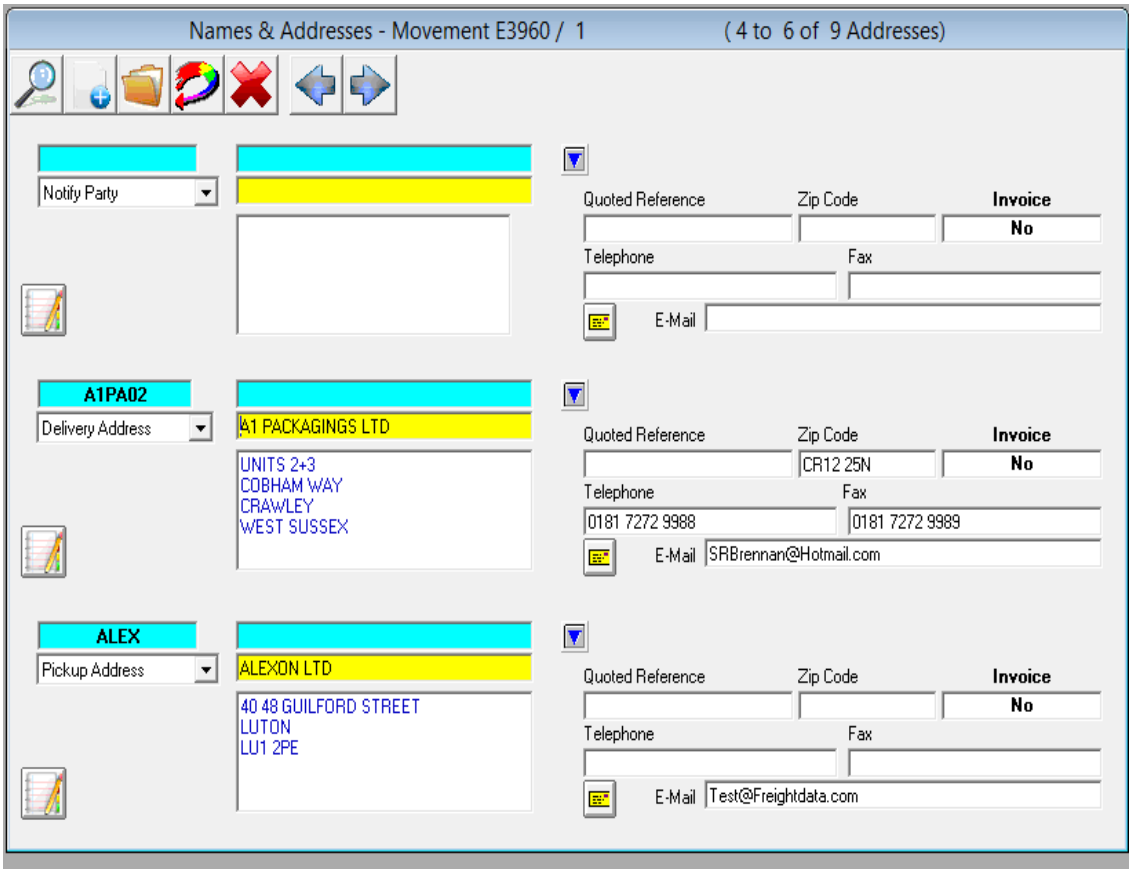
Addresses

To Add Extra Addresses

Enter the Add window via the EDIT menu.

Click on the Addresses option button in the Select box. This will highlight the Addresses box. Click OK to add the extra Addresses. Addresses are added three at a time. If you wish to add several clients, agents notify parties, then you add the extra parties here.





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A-Meta

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Entering a Password

Every time you start the Application you will be asked to enter a Password. This code will be one of two, either a Management Password or an Operational Password. If you enter the Management code you will have access to everything, but the operational code will only give you access to the A-Meta menu and the Languages in the Set-up menu.
The codes can be changed in the **Edit Authorisation** screen from the **Set-up** menu.

If the application is being executed for the first time, you will be notified that there are no passwords in the registry and the passwords will be set as follows:

Operational Password : **OPS**
Management Password : **MAN**

These can be changed in the Changing Passwords screen. To open this screen select **Authorisation** from the **Set-up** menu.

Remember to log in using the Management Password, otherwise the option will be disabled!

The Management Password: **MAN** will provide an extra ICON
See Management Graphs **- A-Meta.**



Changing Passwords

To change a/both password(s), select **Authorisation** from the **Set-up** menu. This option is only available to users who type in the Management password. This option allows the system administrator to change either the Operational or Management password within the A-Meta system.

To change a password, click the radio button corresponding to the password you wish to change and type in the old password in the box as indicated.
When you have typed the password press return.

Two other boxes will appear which are for the new password. Type the new password into the first of the new boxes and retype the new password into the second of the new boxes, then press **OK**.

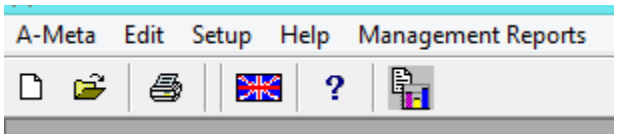
If you enter the original password incorrectly or retype the new password incorrectly, you will be asked to re-enter the password in the relevant boxes.
Passwords are entered when the application starts up; users are prompted to enter a password. For help on entering passwords see entering a Password
Using the Default menu you can create the AMETA Icon for quick access.





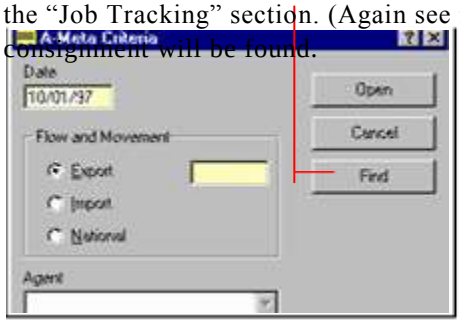
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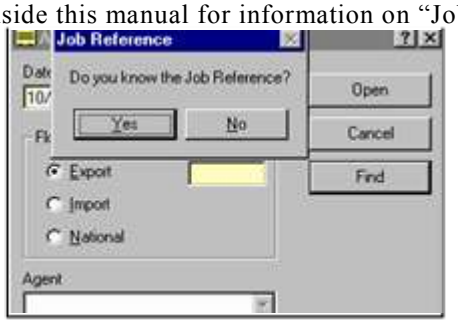
Opening an A-Meta



This *Find* button will allow you to search the records in two different ways.

Firstly you will be asked, "Do you know the job reference". If you reply "Yes" then the Manifest is called (see Manifest section in the Manual) you can then access the consignment. If you enter "No" then the program takes you to the "Job Tracking" section. (Again see inside this manual for information on "Job Tracking). In both cases the consignment will be found.

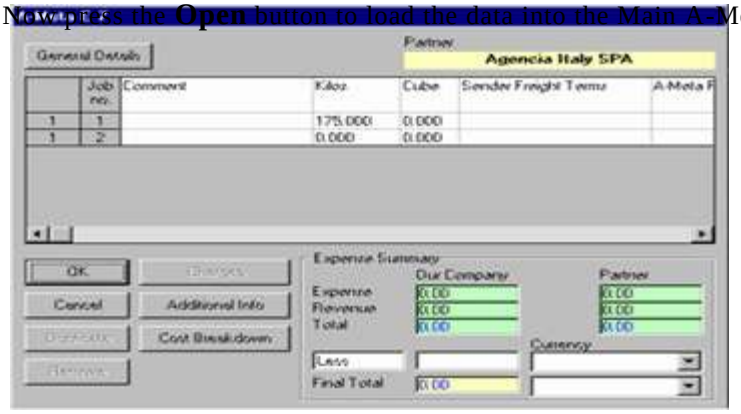




Opening An A-Meta - Continued...

Once you transferred the reference back into the AMETA you can by using the pull down box, click on to the drop down box pick the Agent and then Click ***Open box.*** Your A-Meta will be displayed.

If there is no Agent for the Job you wish to edit, select **<None>** from the list; otherwise select one of the listed Agents. Next press the Open button to load the data into the Main A-Meta screen.



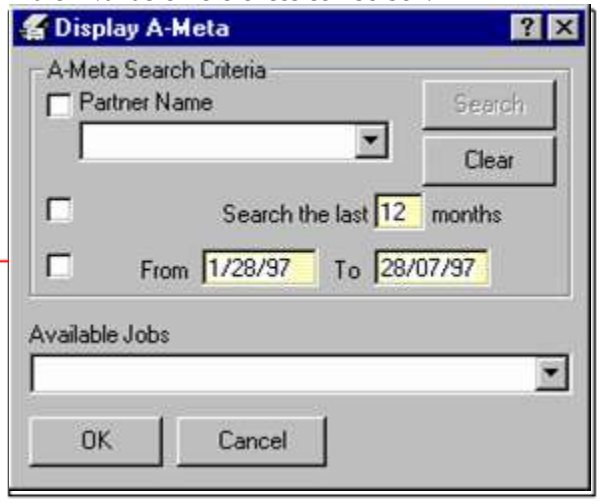
To create a new A-Meta reference, click **New A-Meta** from the **A-Meta** menu. To Create an A-Meta, you must enter a Date and a Job Reference. The only essential field is Master Reference. To open an existing reference enter the reference number into the fields. If you want to view existing jobs before opening an A-Meta, press the ***Find*** button.

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Editing an A-Meta

To edit an existing A-Meta reference, click Edit A-Meta from the A-Meta menu. You will now be displayed with the search criteria screen, where you can specify a particular reference. The screen consists of 3 parts, Partner Name, Search last x months, Search a date range. If you choose to search from a date range, the Search last x months option will be disabled, and vise-versa, but you can combine Partner Name, and one of the date options. To select a partner to search on, just click the check box to the left of the partner combo box and select a name from the combo.

If you are using the **Search last x months** option then click the corresponding check box and enter a value in the text box, i.e. 18 for the last 18 months. If you are using the **Search a date range** option then you must enter two dates in the two boxes in the format **DD/MM/YY**.
Note that the earliest date should be placed in the form box.
When you are satisfied with your entries press the search button. All of the references that meet your search requirements will be placed in the Available References combo box.

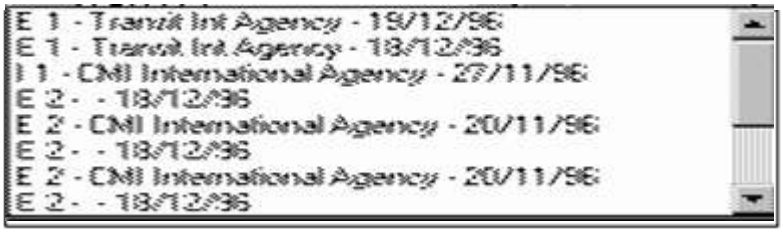


A-Meta- Search Criteria.

To extend the help opposite you might like to try out this example below a list of Agents or client list is displayed, Highlight with your mouse pointer the desired name. (1) You do not need to place a name, although the more information you provide speeds the access, then put an "X" on the Search date box. (2) Click Search and then place the mouse pointer at the list box here. You will then be displayed the list of consignments, (3) Click the mouse pointer at the consignment. (4) click the "OK" button and the consignments will be displayed.



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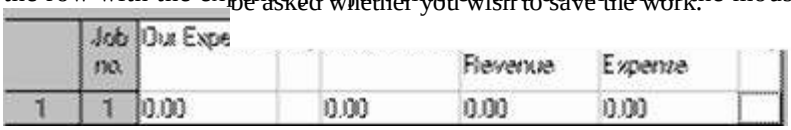
Expense Keys



Expense Keys are entered against Expenses in the Main A-Meta grid. The Keys are also used when you are entering charges against a Job. Your software has already Expense keys created for you. You can add or modify at will

For more help, see ***using the Search Criteria for Editing an A-Meta and Printing an A-Meta*** - ***Close A-Meta*** *jobs.*

When an expense is entered in the grid it should have an expense key assigned to that expense. Both **Our Company Expense** and **Partner Expense** can contain keys. To enter an Expense key move the cursor to the key column and to the row with the expense you just entered and double click the mouse. This will bring up a set of keys.



To select a key either highlight the Key and press the **OK** button or double click on the relevant key, and it will be pasted onto the grid, in the correct position.

Expense Summary

To keep you up to date on the Expense and Revenue of both **Our Company** and **Partners Company** there is an automatic Expense Summary. Every time you make a modification to the numeric columns within the grid the Summary will be recalculated. If either company is at a loss then the totals are shown in Red, otherwise they are shown in Blue.

Note that if a row is removed which contains numeric figures, the Summary will note that a create a new calculation

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Cost Breakdown

You can view the total cost breakdown by pressing the **Cost Breakdown** button on the Main A-Meta form. This will give you a detailed view of the A-Meta you are quoting.

The figures displayed in the **Cost Breakdown** form are colour coded for ease of use. These are the colours and their purpose.

Black : An Expense or Revenue total for a category
Blue : Profit/Loss fields and overall Profit/Loss field shows a profit
Red : Profit/Loss fields and overall Profit/Loss field shows a loss

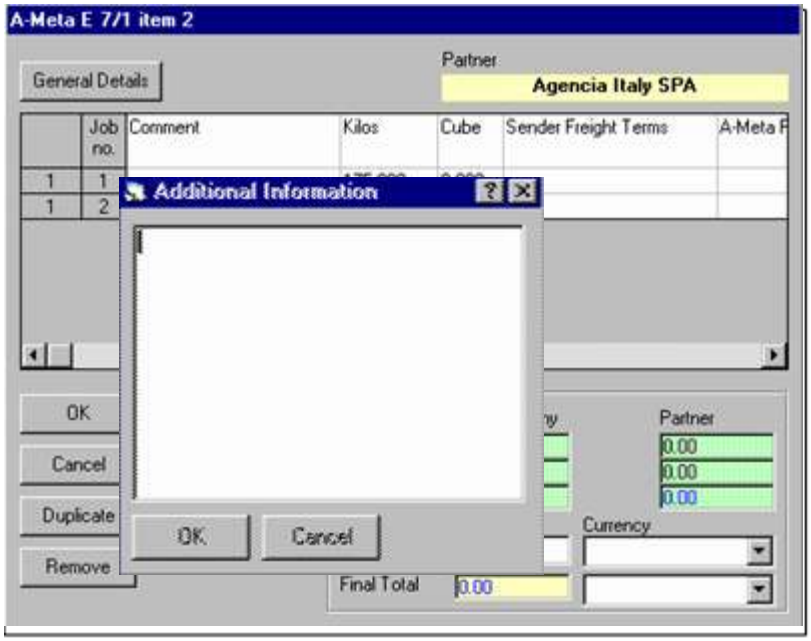


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Additional Information

Each A-Meta reference can have some additional information stored in the database. The information does not serve a major purpose, it is just there for reference. You can type anything into this field.

To access Additional Information, press the **Additional Information** button on the **Main A-Meta** screen.



Selecting a language

The A-Meta application is available in 5 different languages, and they are English(British) , American, French, Spanish, Italian and German.

To choose a language select **Set-up - Languages**. You will be presented with a screen with a flag for each country. Press one of the Flag buttons, and the Application will now be displayed in your chosen language.



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Last Four Jobs

To make the process of opening a reference, there is a quick open feature in the A-Meta application. At the bottom of the **A-Meta** menu there will be a maximum of 4 references.

The References show the Job reference and the Agent for that job.

These are the last 4 files that have been saved to the A-Meta database.

If you click one of these references, the reference will be loaded into the main A-Meta grid.

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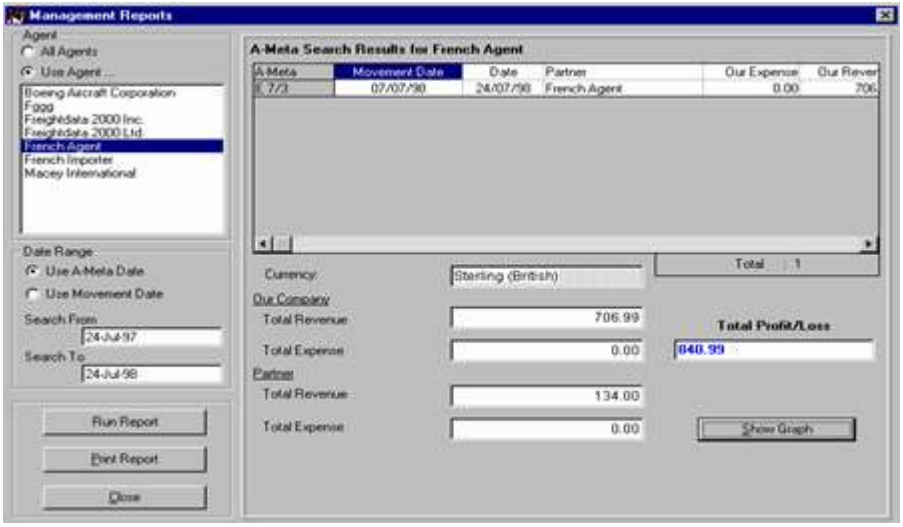
Printing a Reference

To print a reference from the A-Meta app, select **Print** from the **A-Meta** menu. You will be shown the Search criteria box. From this you can define a criteria to narrow down the available references. For help on the Search Criteria see the topic :

Using the Search Criteria for Editing an A-Meta and Printing an A-Meta

Once you have selected the correct reference, press the **Next >** button, and you will proceed to the Windows 98 print options box. When you are satisfied with your options select the **Print**.

The ***Management*** "ICON" 
will create detailed information about the A-Meta, including "All Agents" or one particular Agent, a print of the A-Meta is obtained from here. (See also Management Graphs – A-Metre.) To Operate Click "Run Report".



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Using the Search Criteria for Editing an A-Meta and Printing an A-Meta

The search criteria screen is available when you are editing an A-Meta or you want to print an A-Meta reference. The procedure for both options is identical. The only difference is distinguishing between option has been chosen, but don't worry, the application will take care of that part!

You can define the Search criteria using 3 Check boxes, which are

Partner Name
Search the last x Months
Search Date Range

If you do check 1 or 2 of these boxes, you must supply valid information for the application to process. The application will validate all of your entries.
If you check the partner name the combo box for that option will be filled with every Partner Name stored in your system. You then just select the Partner name you wish to search for.

If you check the **Search last x months** you can search from 1 month upwards. Note that if you check this box, the **Date Range** box will be disabled.

If you check the **Date Range** box you can search a specific date range for valid references. Note that there are two boxes and the dates should be in specific order. I.e. The earliest date should be in the left-hand box and the closest date should be in the right-hand box. Also, note that if the **Date Range** box is checked then the **Search last x months** check box will be disabled.

A-Meta and Printing an A-Meta - *Continued*

When you have entered your selections, you should press the **Search** button. When you do, an SQL statement is built up within the application, and it is then run. Once the search has been completed the **Search** button will be disabled. If you now open the **Available References** combo box, you will see all of the references that meet your Search criteria. Just click on one to select it.

Viewing Expense Keys

To add an Expense Key, select **Set-up - Description Keys**. You will see a full list of Description Keys in the list box. There are 3 buttons to the right of the list, two of which will be disabled unless you select an Expense description from the List. From this form you can Add, Delete or Edit Expense Descriptions. As you can see, Freightdata comes with pre-loaded descriptions, you can keep them or edit them at will.

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Adding an Expense Description Key

To add an Expense Description Key, select **Set-up - Description Keys**. You will see a list of current keys in the List box. To add a new Key press the **Add** button. Another form will appear, with two empty fields. The two fields are for the Key Code (the smaller field) and Key Description (the larger field). The Key Code is a 1 character code. The application will only accept A-Z, so you have a maximum of 26 Key Codes. The Key Description is a general description of the Expense Code.

When you have entered your two fields press the OK button to go back a form. If there are any problems, such as a duplicate Key Code, you will be notified and prompted to enter a different value.

If everything is valid, the new Expense Key will be put into the Expense Key List, and the database will be updated.

Editing an Expense Description

To edit an Expense Description select **Set-up - Description Keys**. You will note that the Modify button is disabled. To enable the button, you must select an Expense Description from the List. When you have done so, press the Modify button. The Expense Description will be split into two parts, Key Code and Key Description, and will be placed into two separate text boxes. The Key Code cannot be edited, only the Key Description. When you have finished with the Key Description select the Modify button and the modifications will take effect in the List and the database.
You will now be returned to the main Expense Description List.

Deleting an Expense Description

To delete and Expense Description select **Set-up - Description Keys**. As with editing an Expense Description, the Delete and Modify buttons are disabled to begin with. To enable the buttons simply select a Key Description from the available list. You can now press the Delete button. You will be asked whether you really wish to delete the Expense Key. You should answer Yes or No.

Application Databases

The A-Meta application uses three Databases. They are the Freightdata 2000 application database, the Freightdata 2000 Common database and the A-Meta application database.
The Freightdata 2000 and Common database's supply the A-Meta application with the information and the A-Meta database stores the final A-Metas and other A-Meta application data.

Database Configuration

A database configuration option is included to allow you to alter the pathnames for the application databases. This option is needed for networking. The database configuration allows full UNC compatibility so you can access any

database from any networked PC. To change the path, select the drive that contains the database using the Drives Drop down list box, then choose the directory containing the database from the Directories list box, finally select a .MDB file from the File list box. Press **OK** to save changes.

NB. to change the Database pathnames for the Freightdata 2000 and Common databases, you must change them in the Freightdata 2000 application. This can be done in the **Defaults** option in the **Set-up** menu.

Using Pop-up Help

Every form that you use within the A-Meta application will support Pop-up Help. You can access this help in two ways.
The first way is to press the 'What's This' help button, which is located in the top right hand corner of the current form. The button contains a picture of a question mark. When the button is depressed simply move to the part of the form you are having trouble with and press the button again. If no help appears then the control does not support Context Sensitive Help.

The alternative way is to position the mouse cursor over the control and press the F1 key. This will do the same as above.

To clear the Help Window from the screen simply press the mouse button anywhere on the form.

Job Tracking

Job Tracking is used when you want to Open a new A-Meta and you don't know the Job Reference. To find a Job, you enter search criteria against the fields (note, the fields change depending on whether the Job is **Export, Import** or **Domestic)**. Creating the search criteria couldn't be simpler. Move to the field you want to contain a search string, and click onto that field. The field will be highlighted in yellow and the list box on the right hand side of the screen will be filled with data relevant to that box.

To enter a date range, choose either Days, Weeks or Months and alter the number by either typing in the number or altering it via the spin button to the right of the box. When you alter any of the date fields, the **'Since'** field changes.

Job Tracking - Continued…

If you want to start again, rather than exiting Job Tracking, and going back in, press the reset button. This will set the Job Tracking form to the default settings.

When the search criteria has been entered, press the **Search** button. This will search the databases and display all of the matching records and list them in the **Jobs Found** list box.

To open a Job, either highlight the Job from the list or double click on the job. This will return the Flow and Movement to the A-Meta Details screen.

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File Maintenance

File Maintenance is used only to clear unwanted files from the **A-Meta** database.

The File Maintenance menu choice is found in the **Set-up** menu.
When clearing records, you clear to the date, so as with File Maintenance you enter a date, and the application will delete all records prior to that date.
For your information, when the form is loaded, the oldest reference date is show, as is the most recent.

You can enter the date by clicking the mouse button inside the date box. This will bring up a Calendar box. You can then select the date by pressing the correct date in the calendar. The chosen date will be pasted onto the File Maintenance form. To proceed with the deletion, press the **Delete** button.

Using the Manifest

The Manifest dialogue box shows the position details for each movement, and the items on each position. Click the arrows adjacent to the Movement number at the top of the screen to change the Movement number, or change the Movement Number by typing directly into the Movement Box. By default, the last Movement is displayed for the new Flow. The Positions can be examined with the use of the scroll bar on the right of the dialogue box. By default, the first item is displayed for each position. If the position is greyed, no item record exists for the item number requested. Click the Other tab to display more information for each position.
To edit one of the positions, click the relevant position number. It will turn yellow and the **Open** button is enabled. Pressing the **Open** button will load the Job into the main A-Meta screen.

Viewing Shipment History

To view the Shipment History, you need first to have opened an A-Meta. It doesn't matter if the A-Meta is new or it is being edited. There are two types of Shipment History. The first is the History of an edited A-Meta and the History of a New A-Meta that uses Freightdata's database. The second type is a new A-Meta created from scratch. If the Shipment History screen you are looking at is of the latter type then you can edit all of the available fields, but if the Shipment History screen is of the first kind then the screen is read only (the information is displayed in labels).

Displaying General Details

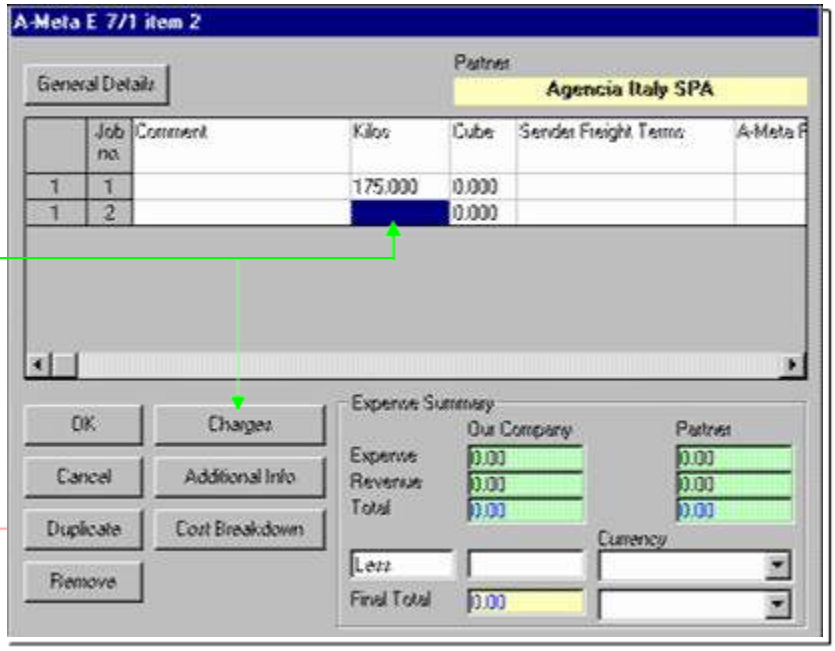
The **General Details** button is located at the top of the Main A-Meta screen. Pressing this button will display the General Details window for the reference. If this reference has been created from new you can enter the details in yourself. To save the information press the **Back** button. This will close the window.

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A-Meta Charges

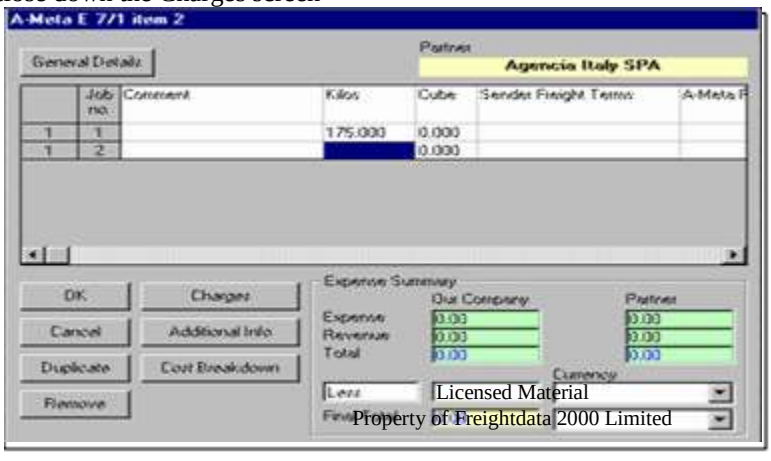
To bring in charges from the Main Charges section, click ***Charges button***
this brings in an invoice screen from which you can select sales Invoices which have been previously charged on this movement. Each invoice can be displayed and charges can be brought into the a-meta by clicking on to individual lines to highlight them. Pressing the copy button brings the charges into the a-meta and returns you to the screen.

The Duplicate button provides the extra as required.



Charges

If you have opened an existing reference, that contains Charges, you can add Charges to the A-Meta Job. To add Charges, press the **Charges** button from the main A-Meta screen. The Charges and Charge Code will be listed. To the left of the Charge Description are two boxes, these are the Key description and the Check box. You can enter a Key description against the charge by checking the box. This will bring up the Expense Keys box. You should now enter the charge, and this will appear next to the Charge Description. You can check any number of charges. The **Paste** button will copy the Charges and Costs to the main A-Meta screen, and close down the Charges screen



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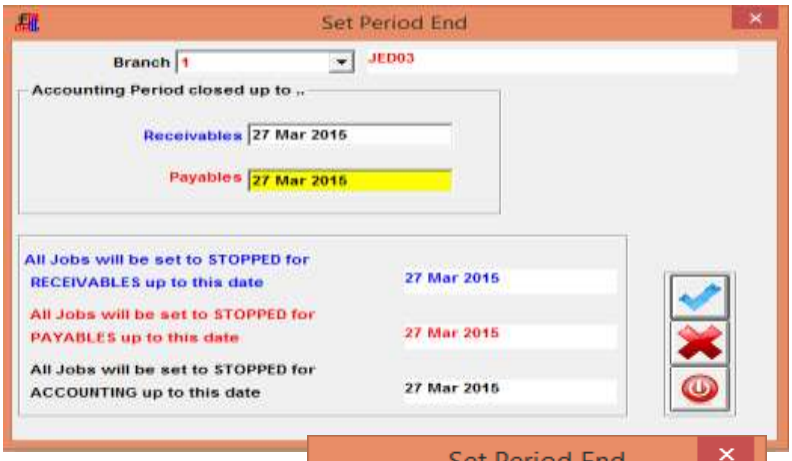
Management

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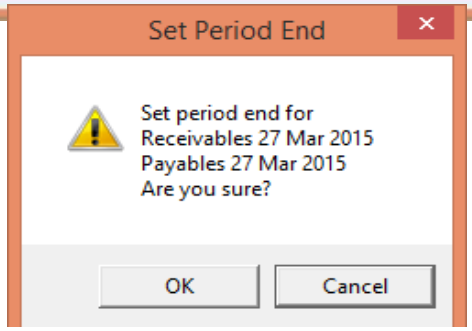
Freightdata 2000

Job Status – Management

From the Management Menu or “ICON” above you can control your “Period End” for your accounts.You can also change the status of consignments.



Each branch can be controlled separately



The click the open door. period end as shown

Now see the next page for the enquiry on the

Confirm this is correct with an “OK”

Then this will return to the main window

Status management,

Summary Information:

There are a possible 4 levels to a normal Job Status.
ACTIVE - all functions can be performed - all details can be changed - normally the job has not yet been shipped. Automatically ACTIVE when first input.
SUSPENDED - Job has not been shipped - perhaps customer owes you money. Job can be re-ACTIVATED. Job is being HELD. Can be deleted. Change status on an Individual basis.
INACTIVE - Some (but not many) details can be changed but Job should have been shipped therefore would not be changing PORTS etc. Job can still be invoiced. Normally if a consolidation you would display by Movement and then set ALL jobs to INACTIVE after shipping.
CLOSED- means no further changes or invoicing to take place. As with INACTIVE you can still see all the details, but you cannot change them and in this case no Sales Invoices. Purchase Invoices can be entered against the job still.

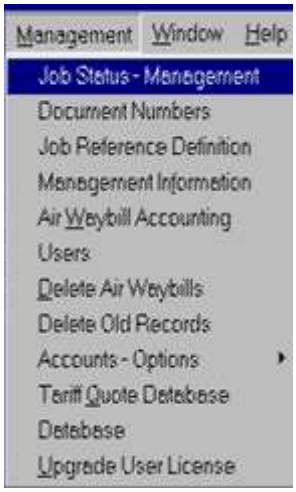
Above can also be set from the Tools - Manifest/Consolidation details. The Padlock icon drop down list can be used to set ALL or those jobs not yet set in a consolidation INACTIVE or CLOSED.

Statuses can be set backwards EG: CLOSED to INACTIVE but only if the user belongs to a group where they have

Administration - Operations permission set to YES.

In addition to the Job Status - Your Accounting period closure dates will dictate what dates are allowed on Sales or Purchase Invoices entered. If your Sales period date is closed up to 15th December 2004 then only dates greater than this can be entered on a Sales Invoice.





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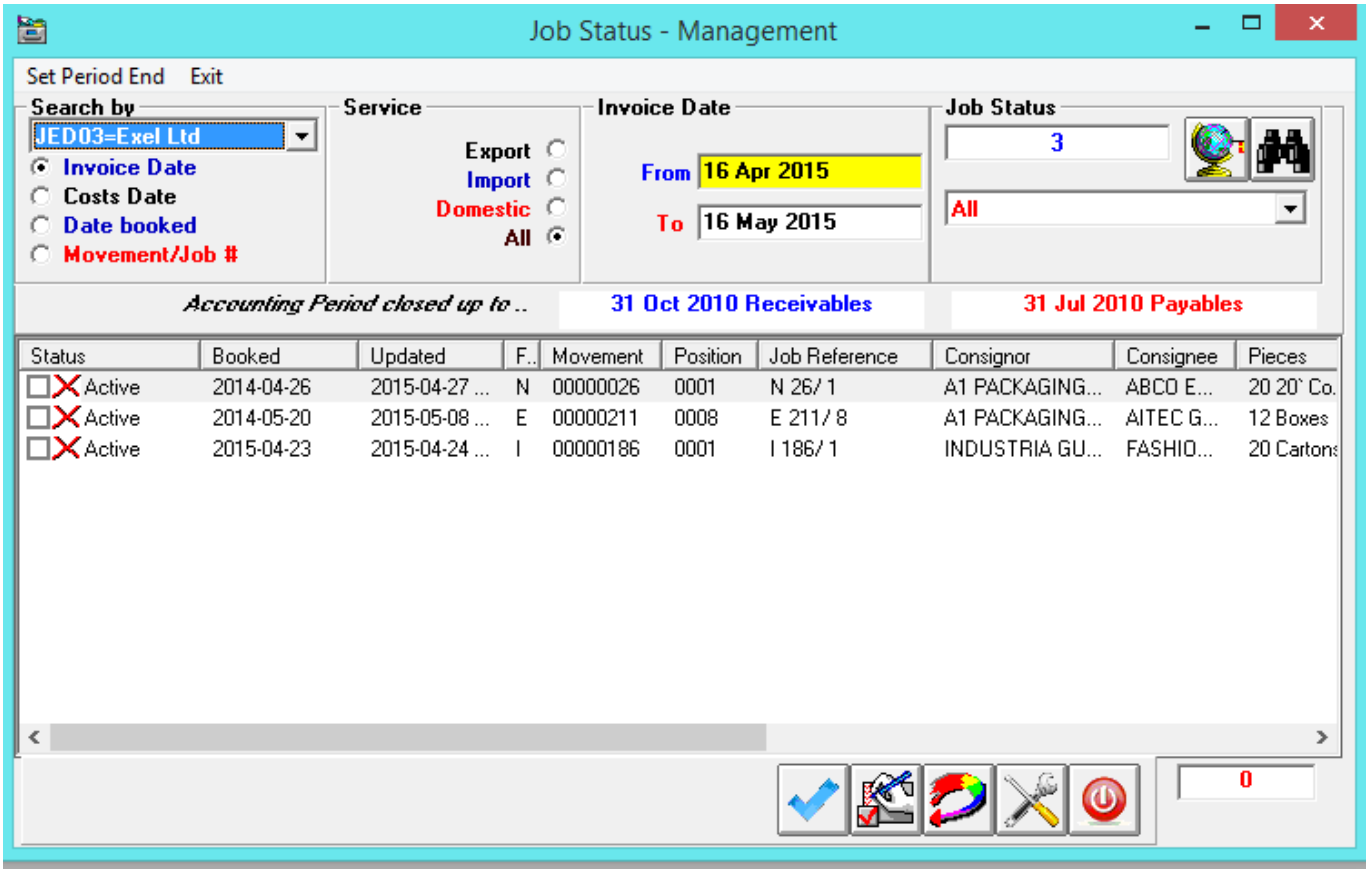


Job Status – Management - continued

From the last page continue here to the main Job Status Management section. This section allows you to control the status of each shipment for example here we show the start of an enquiry to see which jobs are active.

You have also the option to see Suspended, inactive, closed and all.

Click the status as active as in the example below, then click the binoculars, show the active jobs then click the one you wish to change the status of.

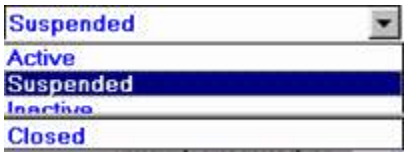


Job Status – Management..continued

We have now chosen to “Suspend” an active account by checking the job status and then choosing “Suspend” below.

The “ICON” button here lets you “Suspend  all consignments, by updating all jobs. You can also search by Invoice date, Costs Date



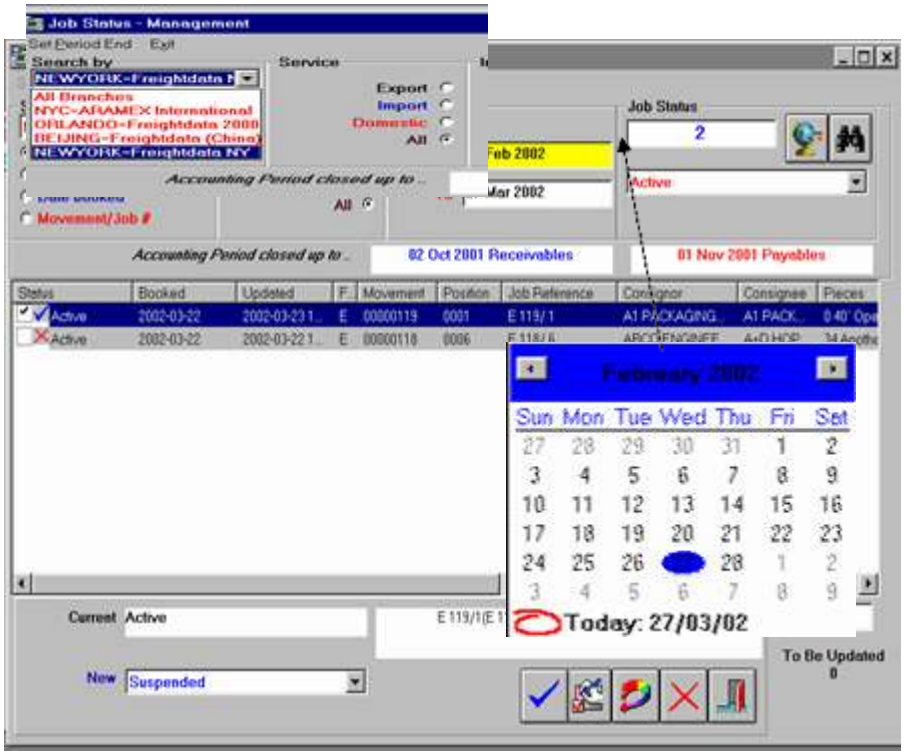


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Job Status – Management. continued

You also have the option to change status of jobs by searching in a branch and then suspending or closing them as shown in the example below.
Click inside the date to call the calendar.

You can chose Import or Export,Dometic or all

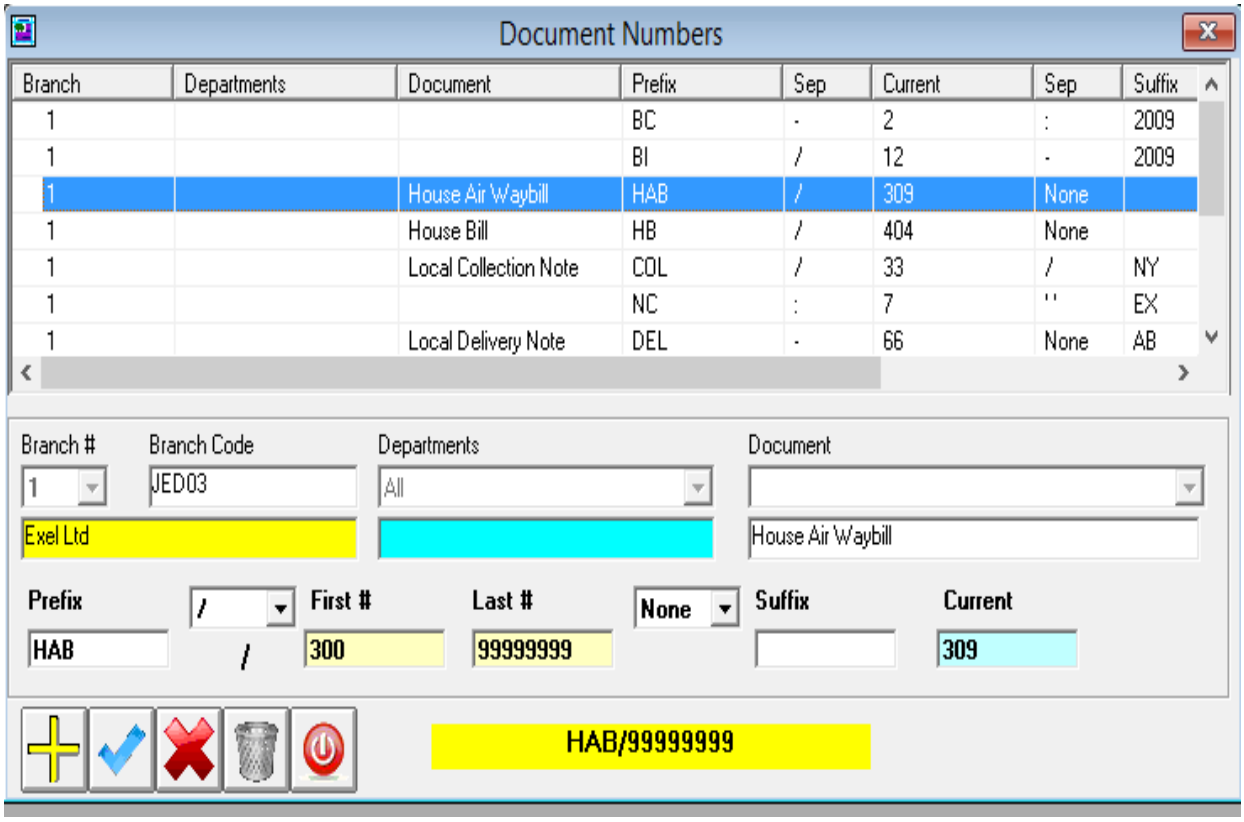


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Document Numbers

This option allows you to choose a numbering system for your documents.

To create a number for example your Booking order click the + button and then click the pull down the document button. Example 2 shows the completed
Booking Order with its numbering system.

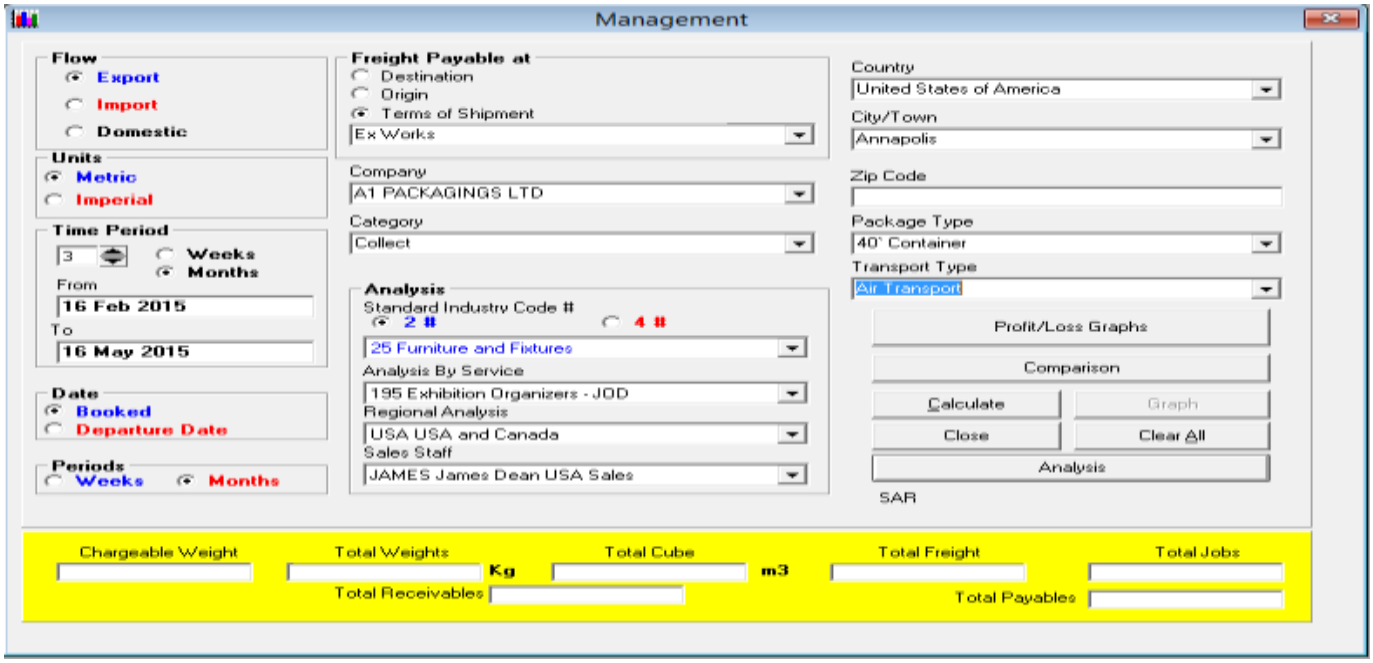


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Management Information System

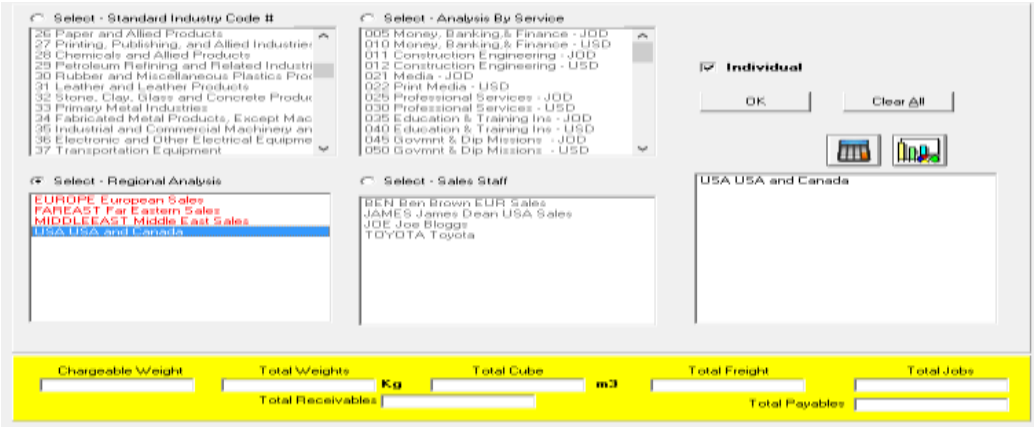
Management Information may be accessed via the tools menu.
Information is produced in the form of 3D bar and pie charts and a numeric table based on criteria specified by the user. Any criteria left blank will match the ambiguous string ('*'). i.e. all data for that criterion.

Cross Matching: You can cross match management information and by the use of the Calculate key provide hprocess this into graph and display management information.



Using Management Analysis

To check performance of the analysis of products such as the S.I.C. codes click the required analysis code. You will see that the code transfers to the box on the bottom right. By grouping all these codes together you can produce statistical information, into the same format for graphs and data. Another example here is the use of representatives listed. Performance of representatives can be compared and combined with regional analysis.



Graphs

To produce a graph, first select the flow. Export, Import or Domestic.
Now select a Time period. This must cover at least two periods as specified by the Periods frame ('Weeks' or 'Months') in order for a graph to be plotted.

If 'Weeks' are selected, part weeks will be calculated. For example, selecting 3rd December 1996 as the start date and 24th December 1996 as the stop date will produce three weeks of information from the 3rd December, acting as if this date was the first day of the week.



If 'Months' is selected as the time frame, the data will be calculated for whole months from the 1st of the month specified as the start date, to the last day of the month prior to that specified as the stop date.
For example, specifying a start date of 3rd October 1996 and a stop date of 3rd December 1996 will plot a graph of two time periods: 1st October 1996 to 31st October 1996, and 1st November 1996 to 30th November 1996.

You may select any of the remaining fields as required.
Enter a part post or zip code in the Postal Area text box to limit the companies that appear in the Companies combo box.

Graphs – Continued…

To produce a graph of data where the Agent is 'Fred's Shipping Agency', enter the company name in the Company field, and select Agent from the category combo box.



all

Pressing 'Calculate' at this point will produce Weight, Cube and Freight totals for the agent specified between the two dates and flow supplied.



To limit the data further, a Country and/or City may be supplied. So, for Export references, it is possible to produce a graph of how much freight has been shipped to a specific town by a specified agency or customer within a particular time period
Clicking the 'Country comparison' button displays two list boxes, one of countries and one of cities.

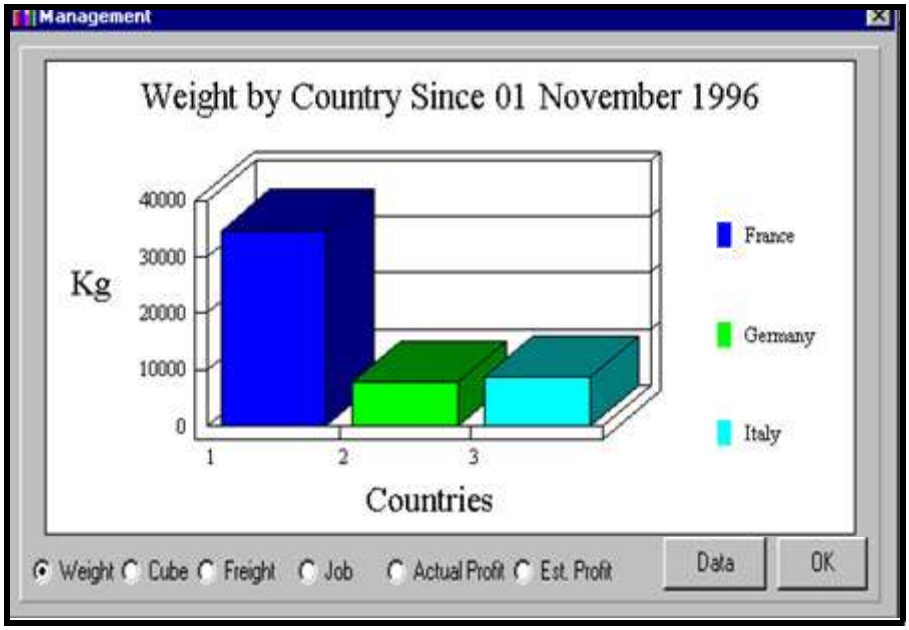




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GRAPHS

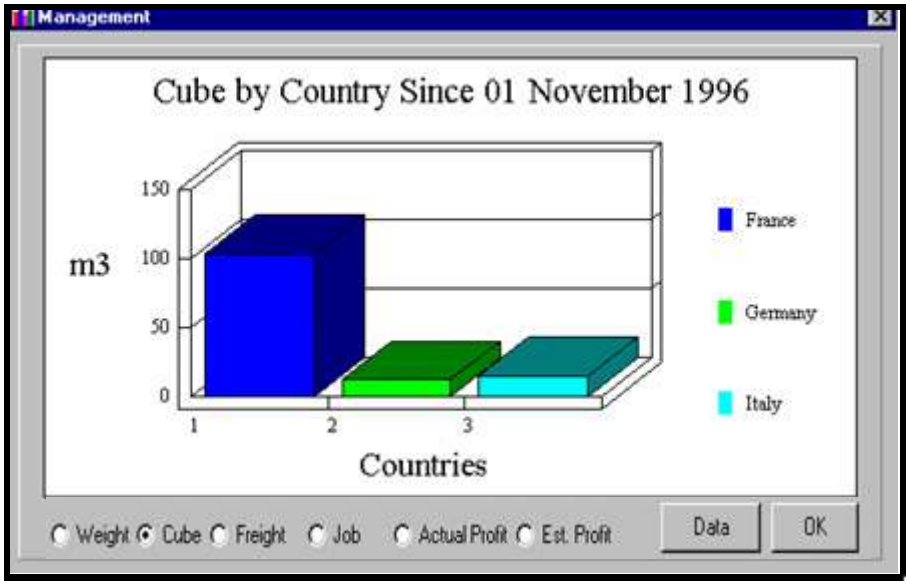
A graph of freight shipped to various countries may be produced by selecting up to 12 countries from the list, or, by selecting up to 12 cities within a country. This may be limited further by also selecting a company. Any countries or cities selected will override any country or city selections on the main panel.
Always click 'calculate' when criteria have changed. The graphs plotted will not reflect changes until this is done. On the graph panel, the information may be changed by the four radio buttons at the bottom of the form. To see the data used to plot the graph, toggle the Data/Graph button. Click the graph itself to toggle between 3D bar and 3D pie charts.



Graph showing France, Germany & Italy weight comparison.

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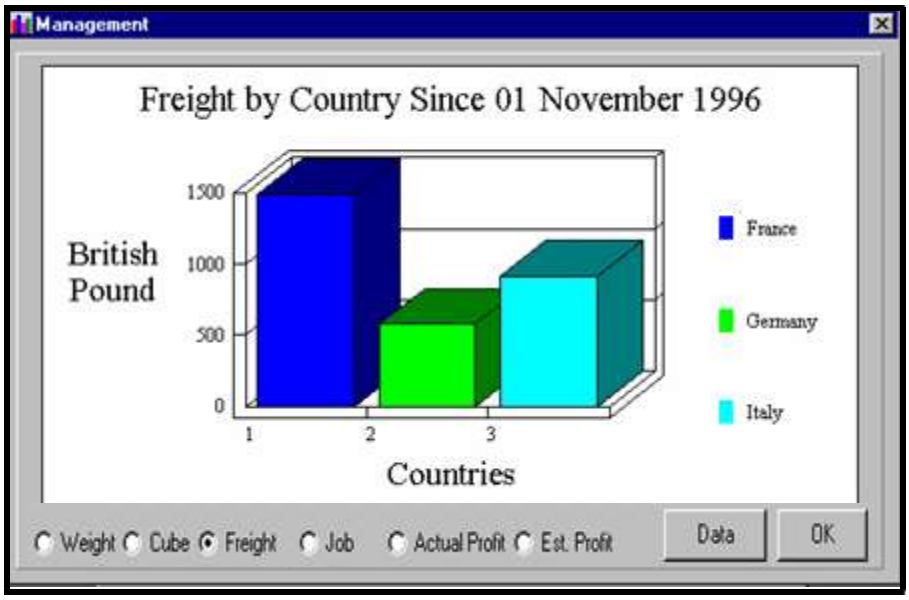
Management Graphs



Graph showing France, Germany & Italy Cube comparison

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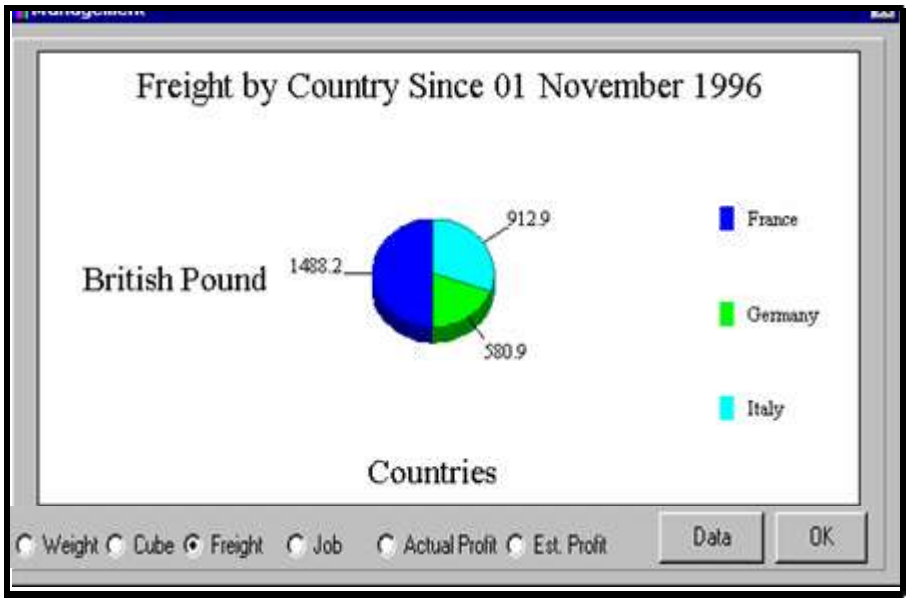
Management Graphs



Graph showing France, Germany & Italy Freight comparison

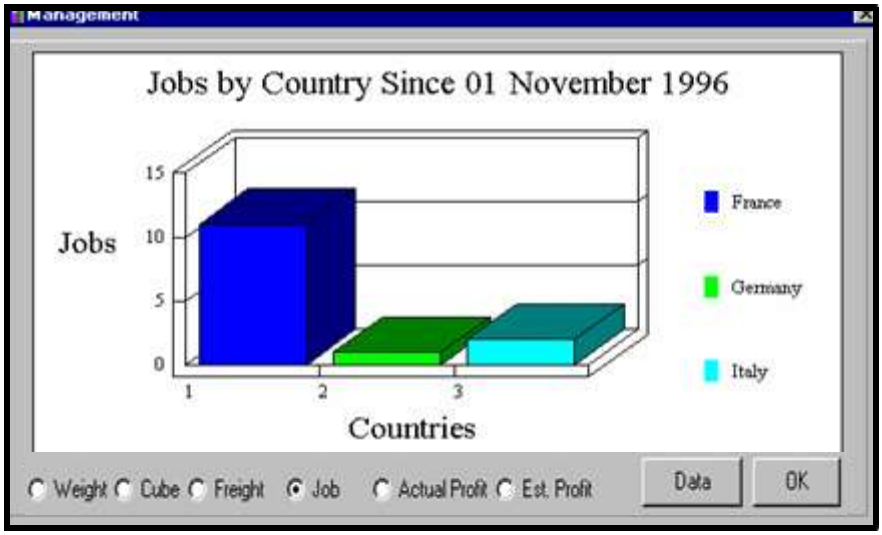
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Alternative Graphs



Alternative Graph can be activated by clicking the mouse in open space on the display graph that is present.

Management Graphs



Graph showing France, Germany & Italy Jobs comparison

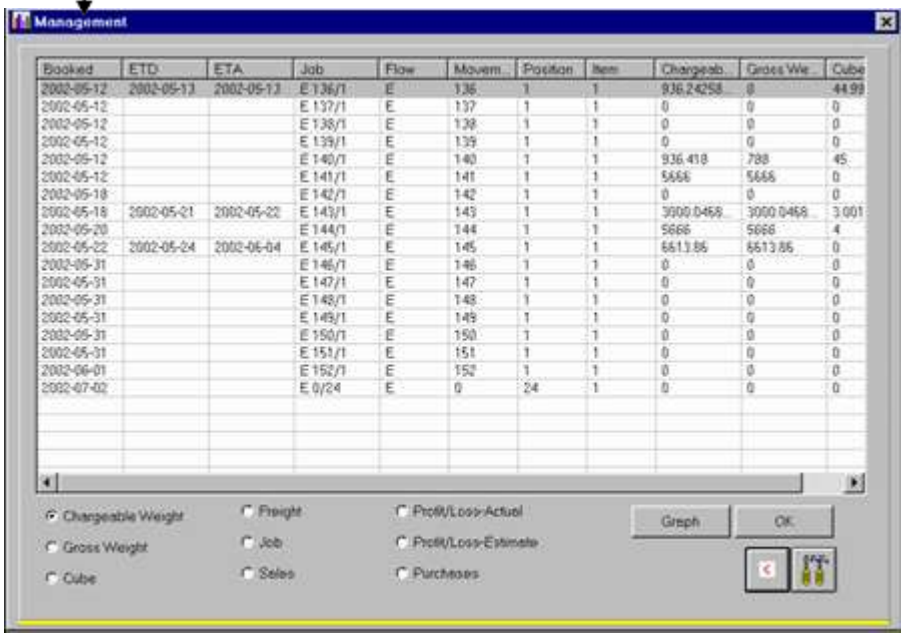


o expand and look at individual shipment in detail click the chevron here.
You can also and date using the tools button next to the chevron to send date to MS Excel.

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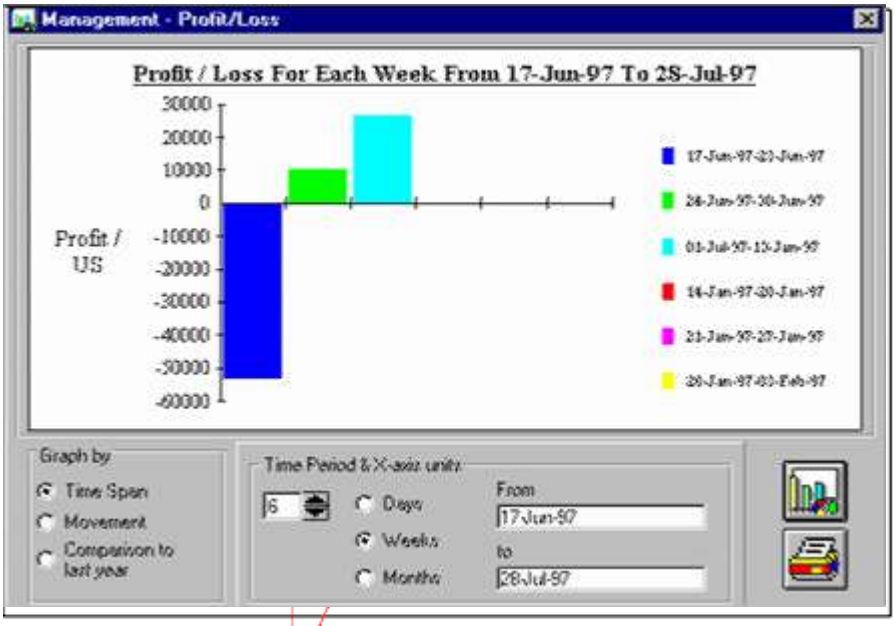
Management Graphs - Data

The data listed below shows the individual breakdown of each shipment that can be altered in the layout by clicking the headings.



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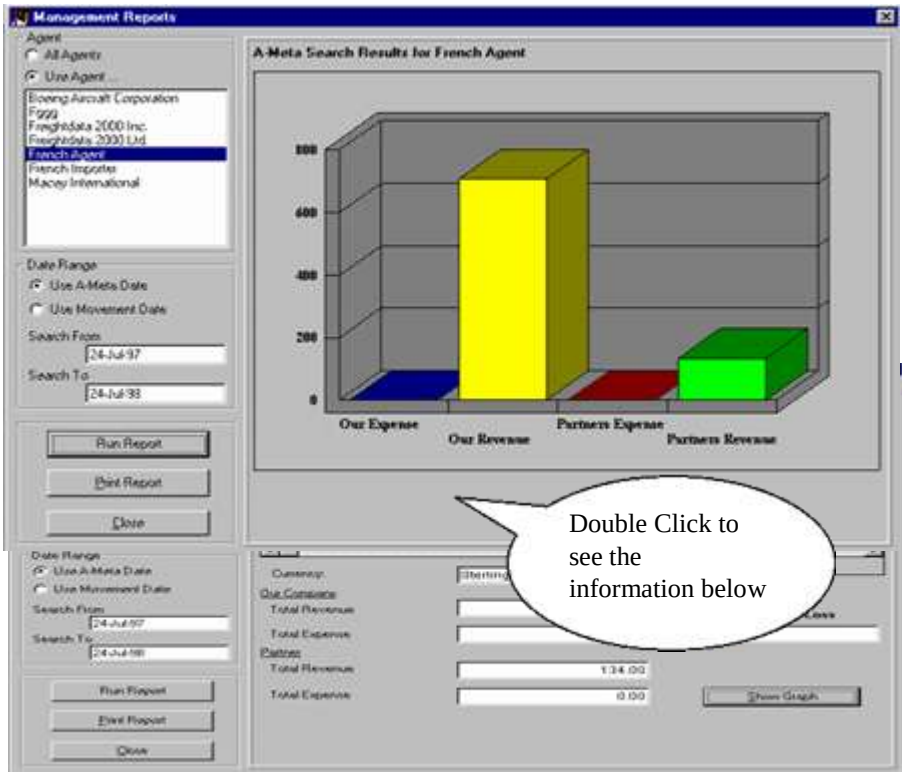
Management Graphs



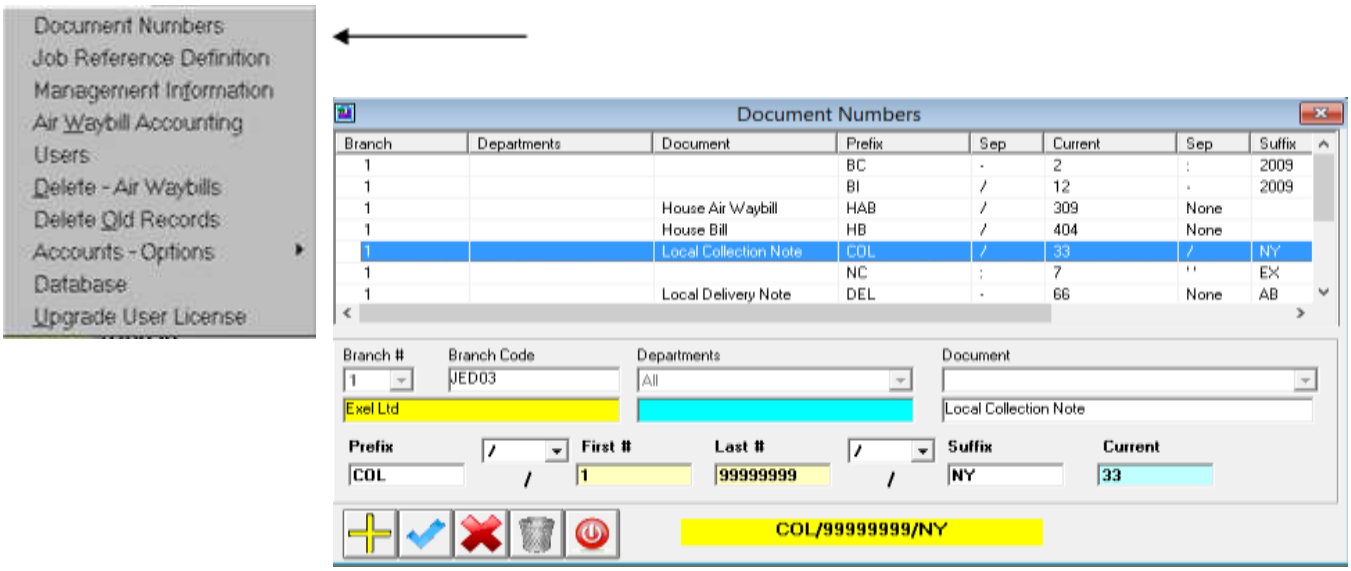
The profits/loss graph is automatically compiled from information entered by the user in the Charges form (See pages 32/33), and shows loss as a negative value and profit as a positive value.

The time period can be changed by clicking on the appropriate unit (Days, Weeks, and Months) and using the up and down arrows.

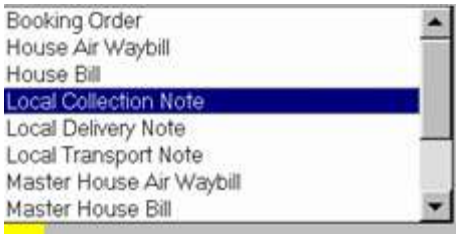
Management Graphs – A-Meta



Create numbered Documents for other Transport Services



By licking the + button you can add your own numbering system to the documents in the listed in the pull own box,



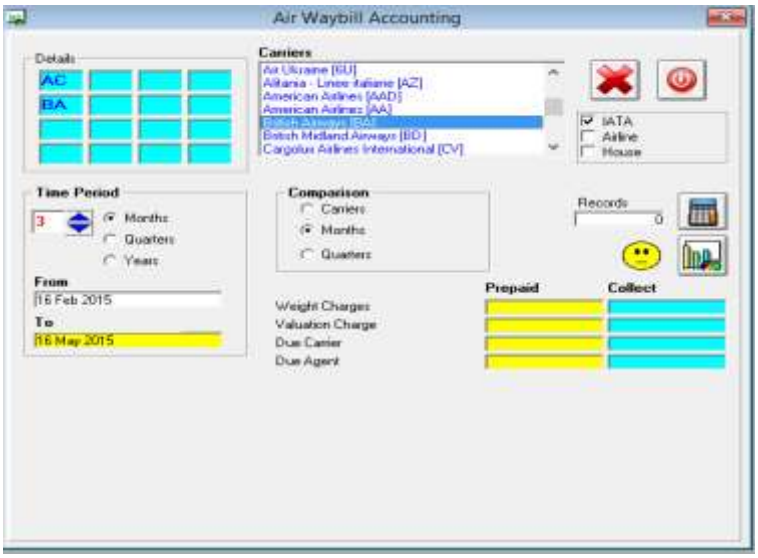
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Air Waybill Accounting

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Air Waybill Management Accounting

This section deals with the Accounting information from Air Waybills issued that is needed to check ***CASS*** information.









Air Waybill Management Criteria

The initial screen that displays is concerned with the criteria required to produce the graphs and grids of information.
The screen displays with a list of available Carriers, a Time Period defaulting to 3 months ending at today's date, and a

a Monthly comparison for all carriers will be accumulated.
The total number of records used is displayed together with totals of Prepaid and Collect Charges for Weight, Valuation, Due Carrier and Due Agent. The Face Icon will change from a Straight Face to a Smiley Face and the Graph Button will be enabled.

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Comparison criteria of Months. No carriers are selected at this point therefore if the Calculate Button is pressed



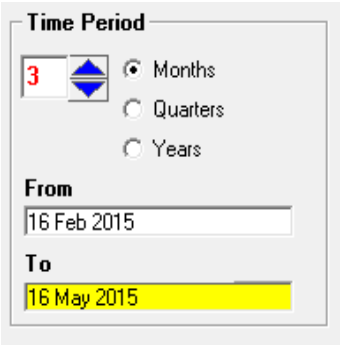
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Air Waybill Management Accounting

Time Period



Comparison



One or more Carriers can also be chosen from the list to produce graphs using the Months or Quarters options. This graph will show Monthly or Quarterly comparisons using totals accumulated only for the chosen carriers.

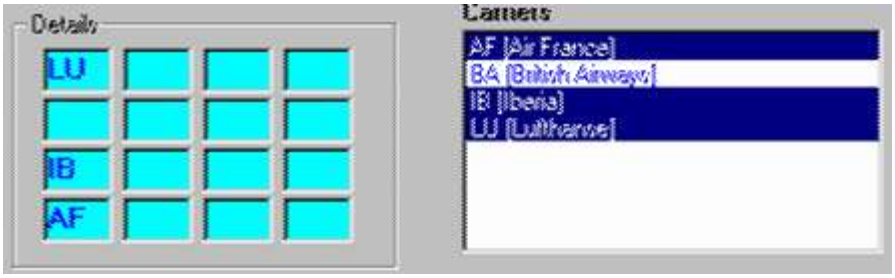
The Cancel Button can be used to clear the Carriers list and return to the initial screen defaults.

This area used to set time period, which will be searched to produce the graphs and grids.
There are two date fields showing when to start the period and when to end. A single click on either will change the background of that field to yellow and this will denote which of the two dates will be used to alter the time period. A double click will bring up a calendar to choose any date. NB Dates greater that today's date will be replaced with today's date. Use the option buttons to alter the time periods by Months, Quarters or Years. Use the Up and Down arrows to alter the number or type directly into this box.

Air Waybill Management Accounting

Carriers

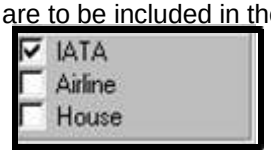
A single click on a Carrier in the Carrier list will select that carrier and its code will be transferred into one of the boxes on the left-hand side.



A second click on the same carrier will de-select that carrier and remove its code from the boxes on the left-hand side.

Air Waybills Type Selection

This area is used to indicate what type of Air Waybills are to be included in the Management information. The default is IATA but any combination can be chosen. If all are cleared and information is requested, it will again default to just IATA.



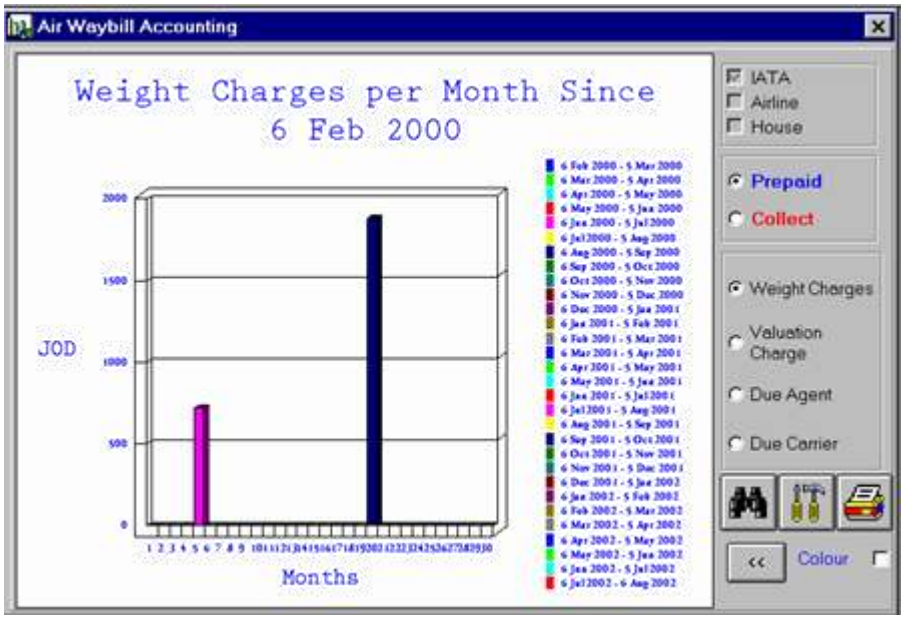
Calculation and Graph Plotting

When the desired criteria have been entered press the Calculate button for the computer to find the records in those criteria and accumulate totals. A message will be displayed stating that there is insufficient data to plot a graph if all the totals are zero or only one graph item is found.
Press the Graph button to display the Prepaid Weight Charges graph.

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Air Waybill Management Accounting

Graph-Prepaid Weight Charges - By Month - 3D Bar Chart



The initial graph will show Prepaid Weight Charges. This may be 'By Month', 'By Quarter' or 'By Carrier' depending on the criteria chosen.
Double Click on the graph to display the graph as a 3D Pie Chart and double click on this to re-display the 3D Bar Chart.

Use the Printer Button to print a copy of this window. If you wish to print the graph in colour use the tick box below the Printer Button.
The print will appear on the default printer.

The option buttons on the right hand side of the graph will allow all the other graphs to be displayed for the given criteria.



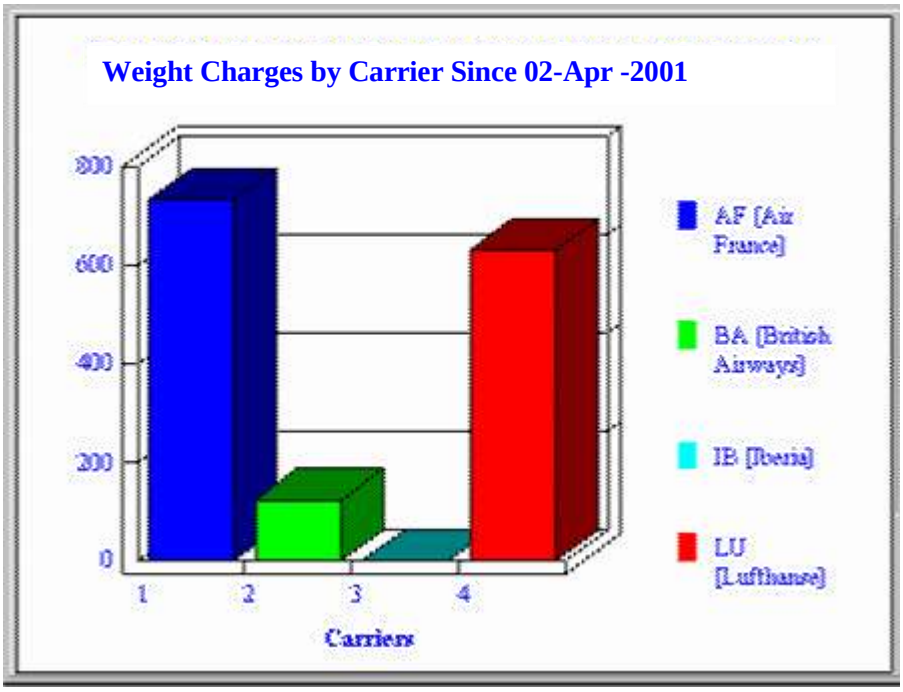
Prepaid graphs have Blue Titles and Collect graphs have Red Titles. Select this from the top option box.

Select which type of charges graph to display from the lower option choices. Choose from Weight Charges, Valuation Charges, Other Charges Due Agent.

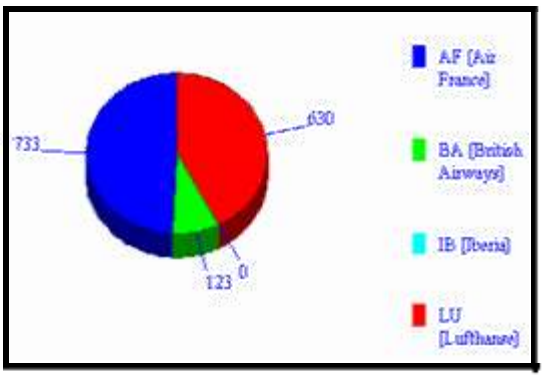
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Air Waybill Management Accounting

Graph-Prepaid Weight Charges - By Carrier - 3D Bar Chart



This graph is an example of how a comparison of 4 Carriers over a 3-Month period might look.
Also shown here as a 3D Pie Chart.
This can also be printed using the Printer Button.



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Air Waybill Management Accounting

Graph - Buttons



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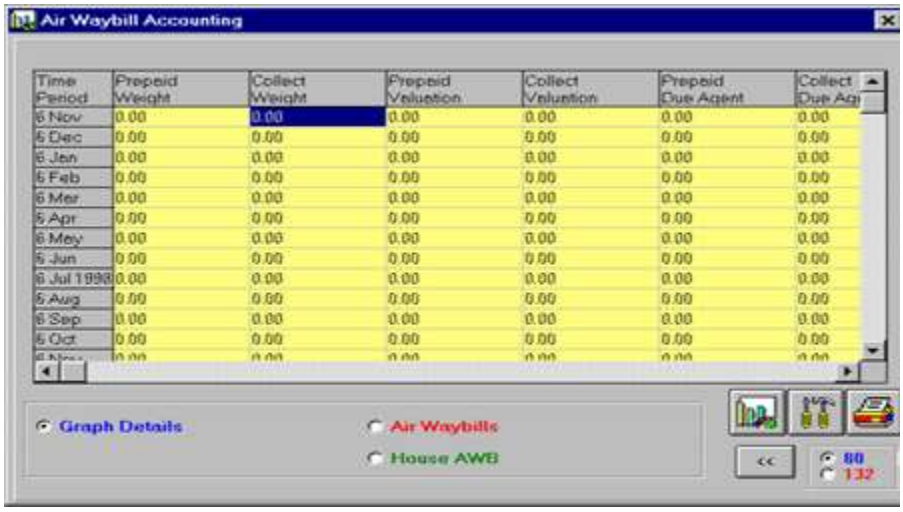
The other three buttons on the Graph screen are the Return Button , the View Button

.

The View Button will show a grid of the data used to plot the Graphs.
The Return Button goes back to the first screen where new criteria can be entered or the Exit can be initiated by Closing the window or pressing the Exit Button. The Printer Button prints the displaying Graph or Grid.
The tool button here provides a link to “CSV” Files to products such as “MS EXCEL”

Air Waybill Management - Graph Details Grid

The View Button will display the Graph Details grid. This shows the information used to plot each Graph. The above is an example of a grid for Graphs plotted by Carrier. This has an extra initial column showing the Carrier Code. Use the Horizontal scroll bar at the bottom of the grid to display the rest of the columns for Due Carrier charges and All Prepaid and Collect.



Air Waybill Management Accounting

Air Waybill Management - Air Waybill Grid

Use the option radio buttons below the grid to toggle between the Graph Details Grid, the Air Waybill Grid and the House Air Waybill Grid.

This grid shows details by Air Waybill, of each Air Waybill used to accumulate totals displayed in the previous grid and Graphs. The order in which this displays will depend on the criteria chosen for the Graphs. Again the scroll bars on the grid can be used to see all Totals using the horizontal scroll bars and more Air Waybills, using the vertical scroll bars. The vertical scroll bars only appear if there are more than 12 Air Waybills.



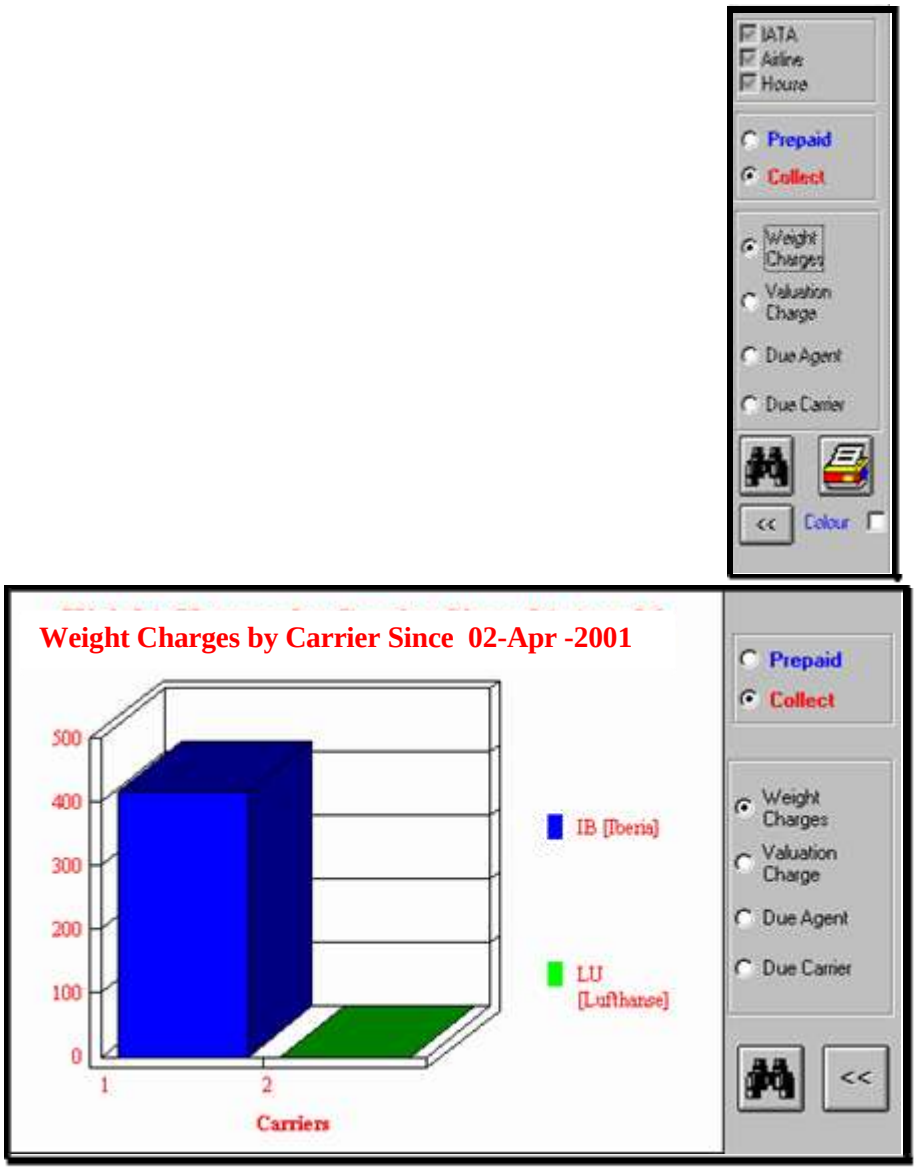
Use the House Air Waybill ***radio button*** to view the House Air Waybill numbers and data. Press the Graph Button to return to views of the Graphs or the Return Button to go back to the Criteria entry screen. Press the Printer Button to print the grid as an 80-column (A4) or 132 column (Wide Listing Paper) print.

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Air Waybill Management Accounting

Graph-Collect Weight Charges - By Carrier - 3D Bar Chart



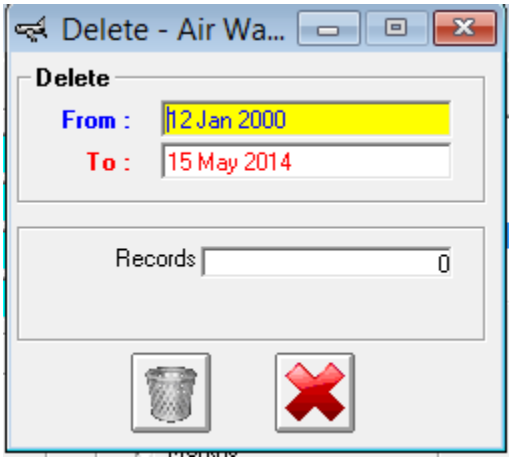
This is an example of a Collect Weight Charges graph - By Carrier. The time period for this has been taken from the 1st April.

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Delete Air Waybills



This window is used to delete old Air Waybill information. On loading the dates will display with the oldest date found in the first date box and the newest date that can be deleted in the second date box.

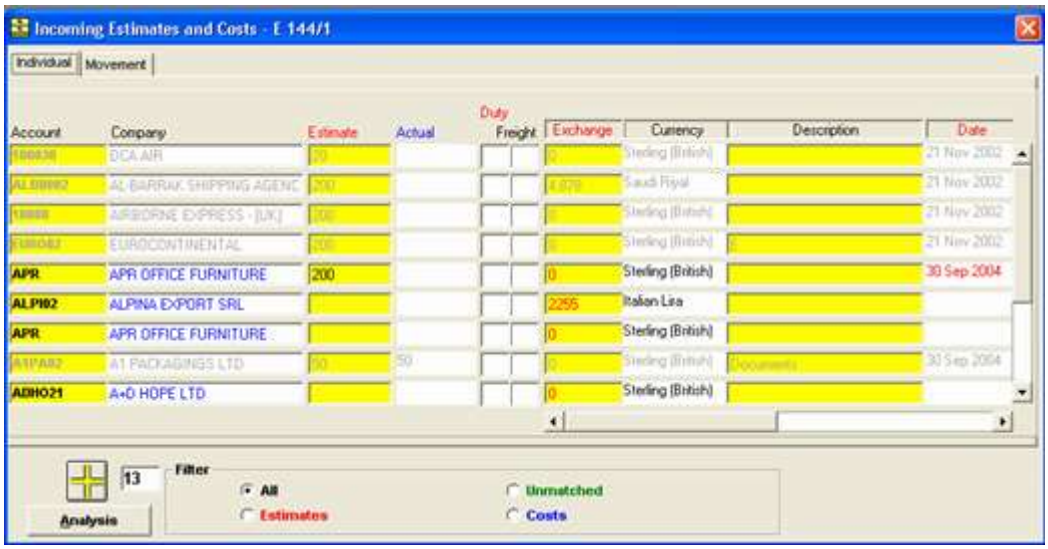


This date is calculated using the criteria entered in the ‘Air Cargo - Defaults’ option.

Click in the appropriate date box to bring up the calendar window to alter the dates. You
will not be able to enter a date older that the oldest date on file. Also you will not be able
to enter a date outside the Deletion criteria.

Pressing the Delete Button will search for and count the number of Air Waybills that can be deleted. If any are found a message will be displayed showing the dates and asking if deletion is to continue. Press the Cancel Button to restore the original date values.

Job Costing



Job Costing begins with an **ESTIMATE** accessed via the **COSTS** button on the Invoice.

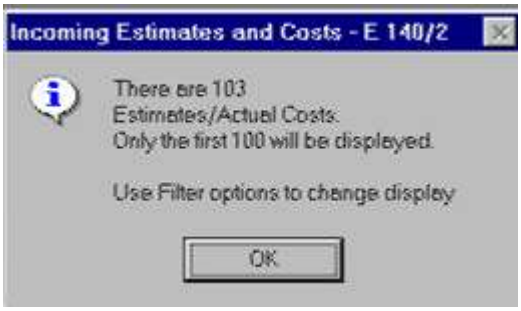
When you "Click" on the "Costs" button the following screen displays below. Double "Click" anywhere in the accounts White Box (Where we show Sea Link Shipping Inc.) You will the get a list of accounts, or you can free type directly into the box if you are unsure of who is your supplier (Eg: P & O or SeaLink)
You will see that we have entered estimates into the Window as expected charges on the Purchases for when they eventually arrive.

Individual Type will place the charge directly against the shipments without Pro-rata. For Profit and Loss purposes.

Job Costing Estimates

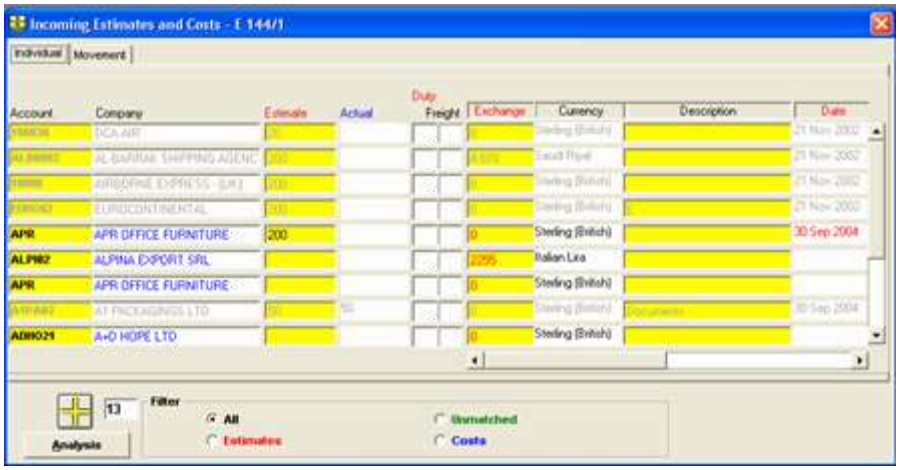
Movement Charges will be proportioned against individual Jobs using the Chargeable Weight in a pro-rata calculation.
For example if you are loading a Container and you wish to work-out the Profit of an Individual shipment you would not want the Sea Freight to be allocated against just the first shipment as this would appear as a loss and all the other shipments on the container making a profit.

IMPORTANT If you access the job costing and the Window below appears this will warn you that only 100 costs/stored estimates will be displayed. You can enter extra costs into the purchase invoice allocation but you can only have 100 estimates on one individual job or shipment.



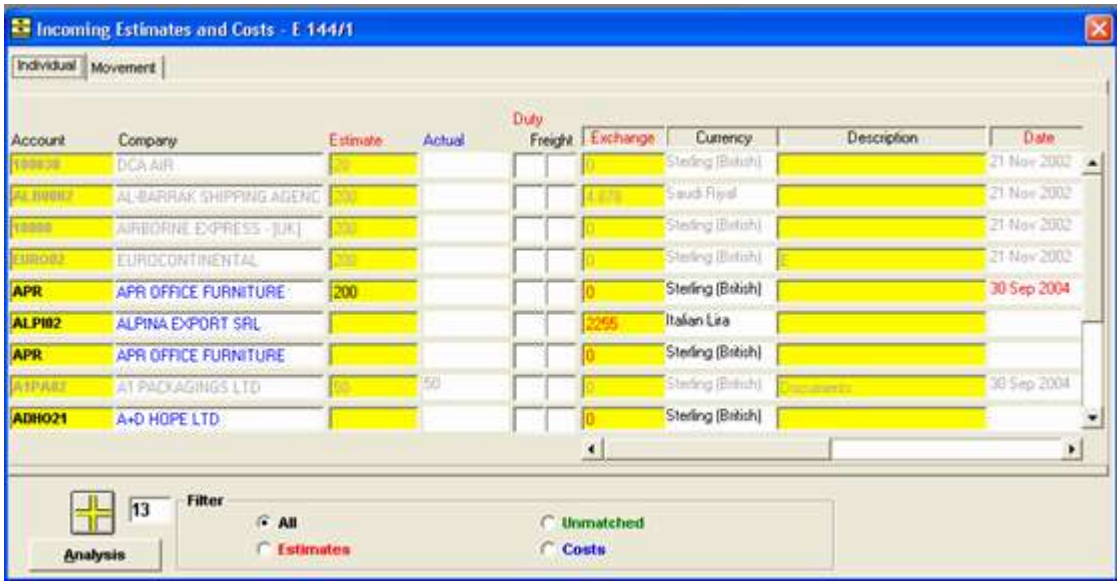
Job Costing Estimates

You will note for this example that the Currency is in Sterling (British) This currency is the Currency of the Account chosen. If you have entered a free hand name then the currency will show as your local currency. (Your Local currency is denoted by the currency chosen in your Company Details
If this is Estimate is for a Foreign currency the latest Exchange Rate will automatically display and can be altered.



"Clicking on to the Currency heading or using the slide control at the bottom of the display will change the display box as below to include a Description field. See next page .You can by clicking the "ALL" "ESTIMATE" "UNCHARGED" and "COST" radio buttons - see each individual status.

Clicking the Description Heading or moving the scroll bar will change the display box below to reveal the Invoice & date details. However these cannot be changed because they are automatically updated from the Purchase allocation. The date will appear as the date of booking when an Estimate has been entered but not matched.
Now you have some idea of the estimates, you need to look at the Purchase Invoice Allocation in the next section. We will return to the Estimates later in next section.



Using the scroll bar you can see Invoices and payment orders made against these estimates

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Purchase Invoice Allocation



First Click on the Management Menu

Then the



You begin by booking-in your Purchase Invoices as displayed on the next page, by breaking down the value and the Tax as shown in our example. You can enter a Purchase reference and you will note that the current date displays as the Date of the Invoice or Credit Note (Click the Invoice for a CREDIT). However, by clicking on the date you can change this by using the calendar.
Entering the details of the Invoice is performed using either the



This button is used for a' ***Matched Estimate'*** (Used when you can allocate a cost direct to an estimate) This option locks the data





This button is used to allocate a cost to a job where there is ***no*** estimate.

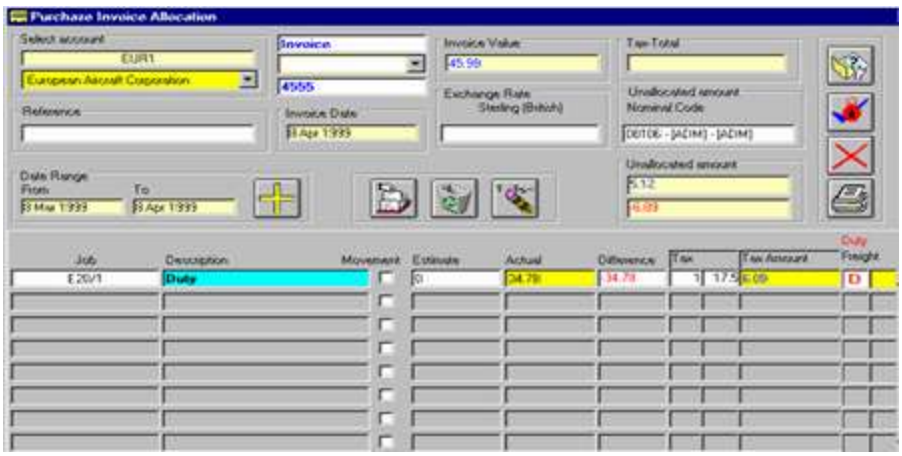


After clicking the button you will see the following Window.
This window will allow you to allocate the cost charge to a particular estimate on a shipment.
In this case we are issuing against Ref E8/1

Purchase Invoice Allocation – Continued……

You can add Duty & VAT Invoices by clicking in the Duty Box. This will change for "D" for duty or click again for "V" VAT.
Freight can also be confirmed by clicking in the box next to "D" or "V" the letter "F" then appears.





Nominal Allocation

You can allocate a Purchase Invoice to a particular Nominal by clicking in the Unallocated Nominal Code box shown here - as 08106 –

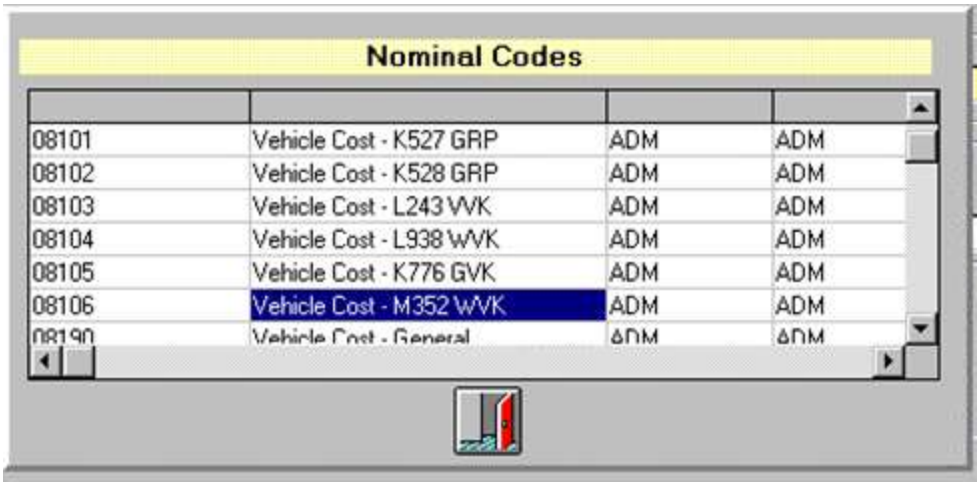
Below you will see the Nominal
Highlight the Nominal required

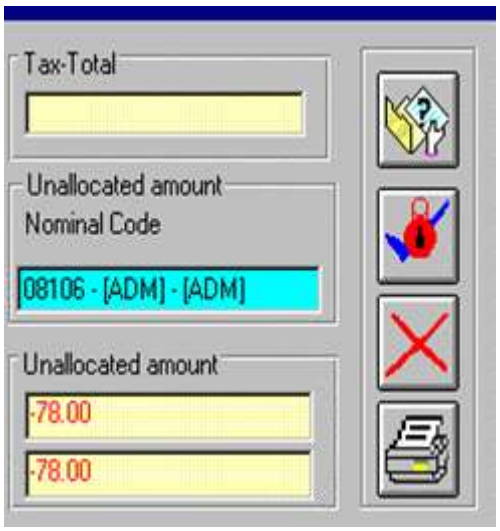
will match the allocation.

ADM-ADM

allocation option

and box highlighted, here in blue





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Match a Cost against an Estimate

The Jobs displayed on this screen are for Jobs with Estimates that have not been matched (IE: Actual are zero) that are for this Supplier or have been entered as Free hand Names. They are filtered by dates – the default being up to 1 Month old.



Clicking on the Start or End of the date range, to display a Calendar can alter the date criteria. The screen will default to Export Jobs and Individual Estimates.

Selecting the appropriate Radio buttons can alter these.
You now need to allocate the Purchase Invoice against the Reference Shipment
You did earlier. You will see that we have highlighted the reference E 88/1. This is confirmed in the Match Cost Estimate Window. "Click" the check button

Match a Cost against an Estimate

You will see the Window below, confirm "Yes" and the details will come forward into the Purchase Invoice allocation screen. Several estimates can be chosen in this way if the Invoice covers several shipments, When all estimates have been found,
exit from the Window.

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Purchase Invoice Allocation

On return to the Purchase Invoice Allocation screen you can now change Descriptions of the charges and enter the Actual amounts.

"Double Click" on the Actual field on a line to bring in the Estimate value,or enter it manually if it does not match. (The difference will display).

As Actuals are entered, the unallocated amount at the top of the screen will alter.

If the charges relate to a shipment but the Estimate has **NOT** been entered then use the 'Add a Cost' button to allocate the charge to a Shipment.

This shows the following screen similar to our Estimates screen, but this will display all Jobs between the dates specified.

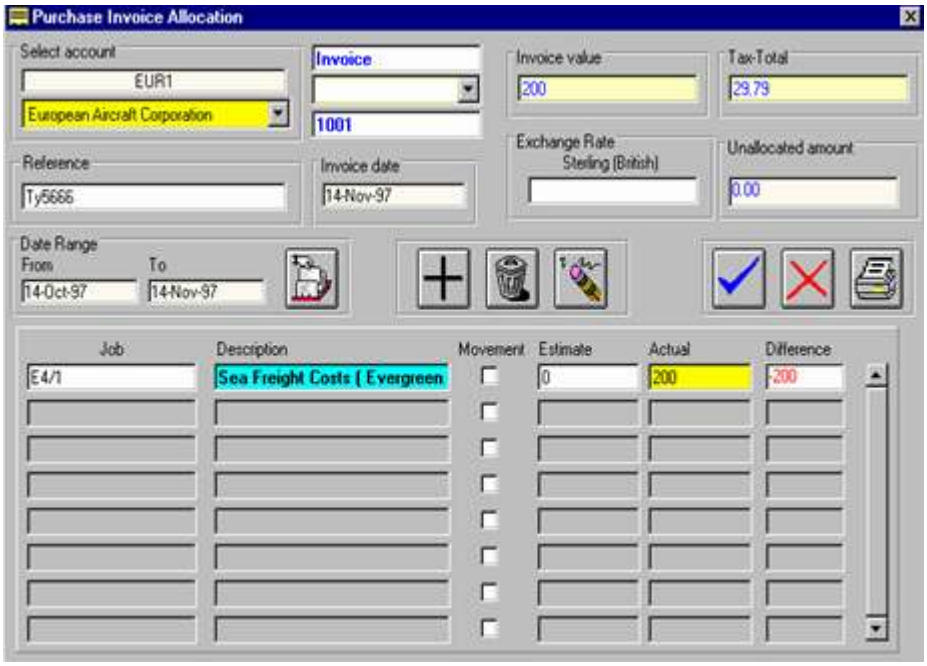


Again click on the job reference that you wish to allocate this cost to, then click the check button to bring the Job Reference into the Purchase Allocation. This line will display the Job Reference with no Description and of course no Estimate.

Enter in the description, double click to Actual field to automatically bring in the Unallocated Amount or enter the Amount manually.

You will see that there is a difference displayed in Red. This is because no "Estimate" has been entered. You cannot enter data into the "Estimate box" as this is entered in the "Cost" section of your Invoice. Once an Actual has been posted against an Estimate, the Estimate cannot be altered.

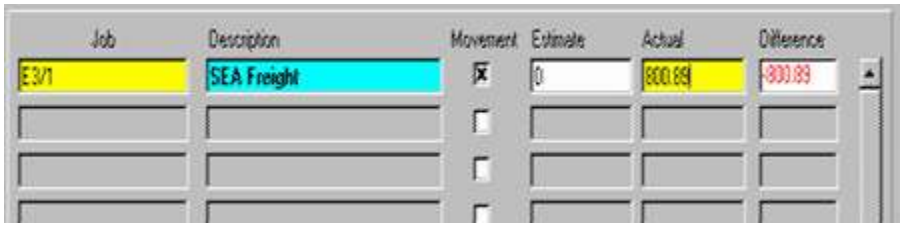
Accept to Purchase Invoice Allocation by clicking the Check button.



Purchase Invoice Movement Costs



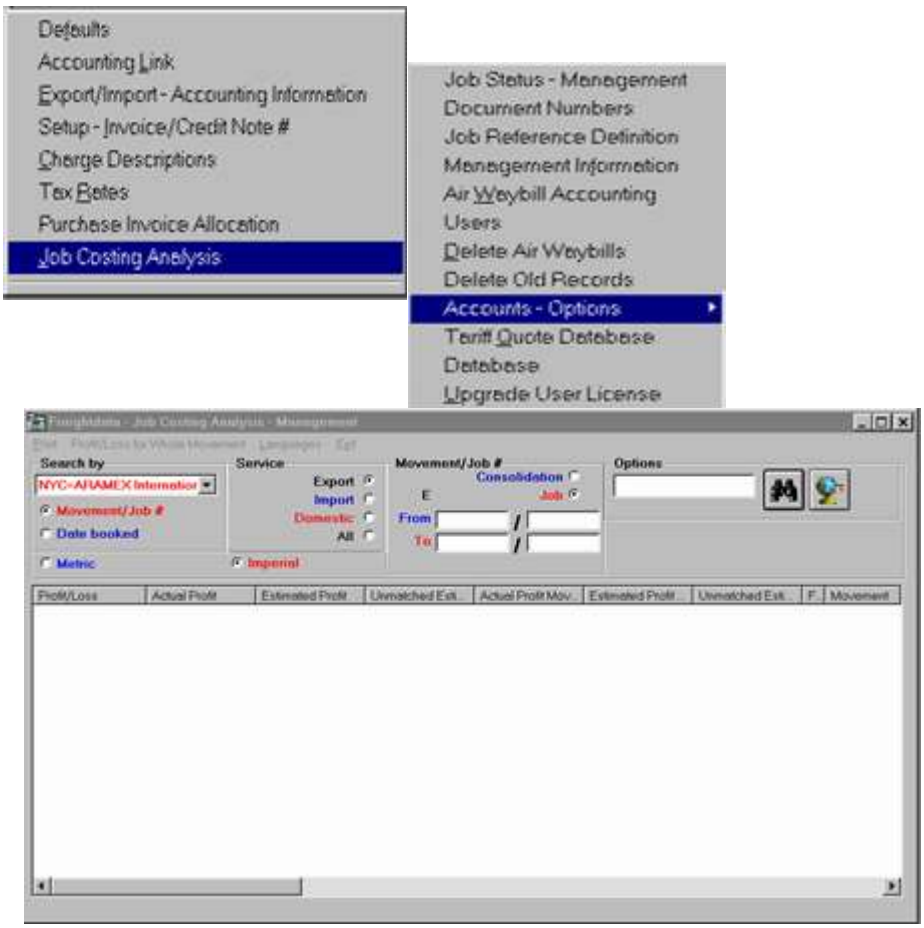
The Movement costs as explained earlier treats the costs as a Pro-Rata item.
As before allocate your Invoice and “Click “ the “+” button. However this time
“Click” the Movement “Radio Button” as shown in the example. Highlight the reference required and
“Click” the Check button. Confirm the entry and in the same way as Individual cost the cost is allocated.
Input the charge in the “Actual” as before. However you will notice that an “X” in the Movement box is now confirmed.



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Job Costing Analysis

In the Management menu choose Job Costing Analysis then Accounts – Option.



Job Costing Analysis – Continued

Next click the search by pull down box and find your client.

Confirm if you wish to search by movement/date booked and the service.
You can also search by Metric or Imperial.

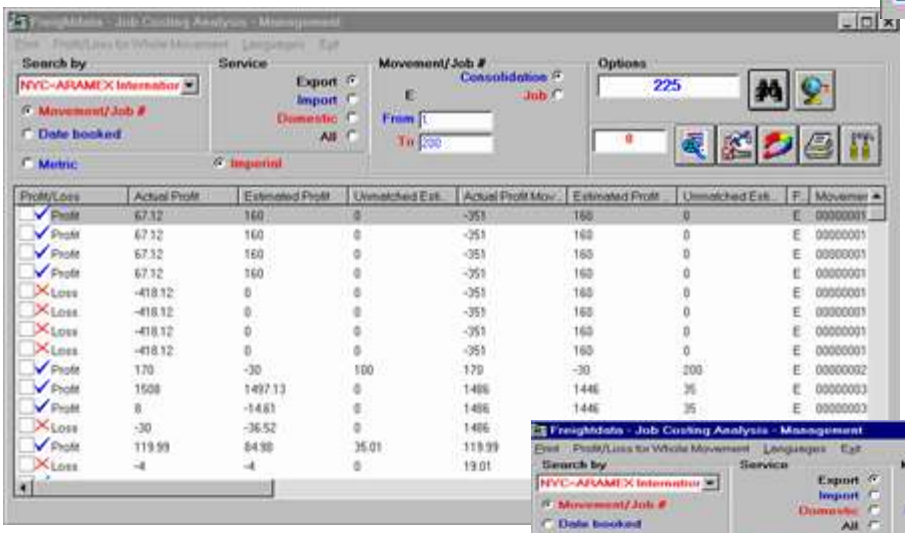


Now enter the range of reference and if the shipment was Consolidated or was a individual job. Now click the binoculars to search. You can also at this point click the world button to change languages.



Job Costing Analysis – Continued

Below you will now see the results of the search from the previous page.
Firstly, if this search is not correct you can change the reference date and  re-click the binoculars to re-calculate.



Now lets look at each new individual "button" now displayed. Firstly the "breakdown for consignment" Highlight the shipment you wish to Examine as shown in the example below. Click the button.

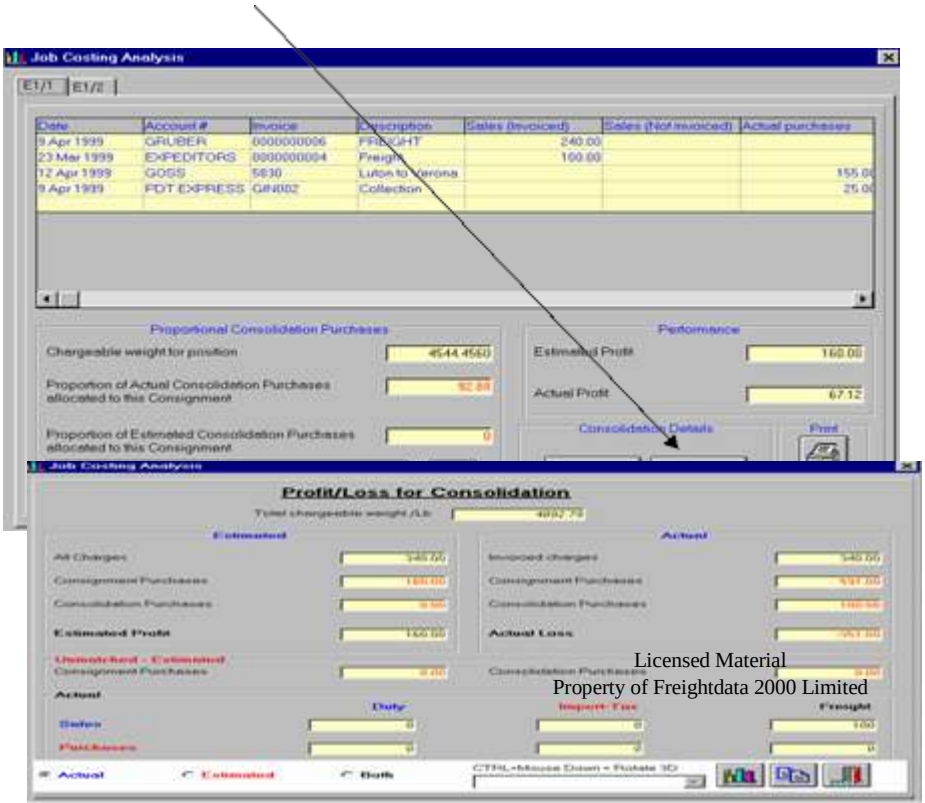


 This button allows you to select all.
These buttons allow re-do and print and the other tools button exports to MS Excel.
To print individual shipment click the print under the profit and loss heading



Job Costing Analysis – Continued

By clicking the button we go straight to the "Job Costing Analysis" screen.
Details of this option are explained in the job costing section. However, click the profit button here. You will then be presented with the Profit/Loss Consolidation.

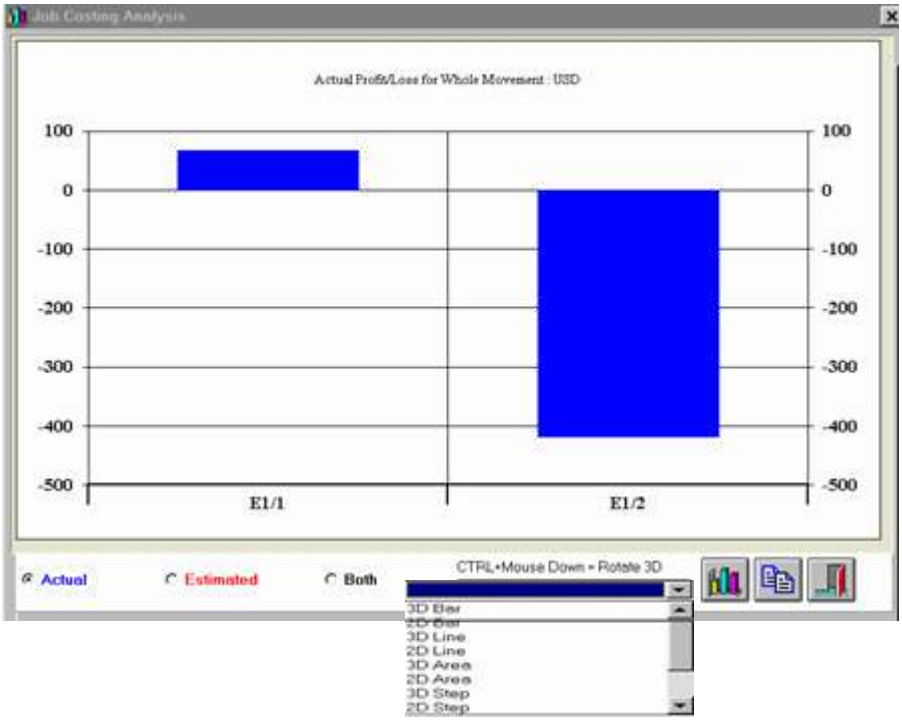


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Job Costing Analysis – Continued

From the Profit/Loss Analysis you can choose to view Actual, Estimated or both costs ente red from the accounting section. Click the Graph button first. The choose from the pull down list the type of graph you wish to see.

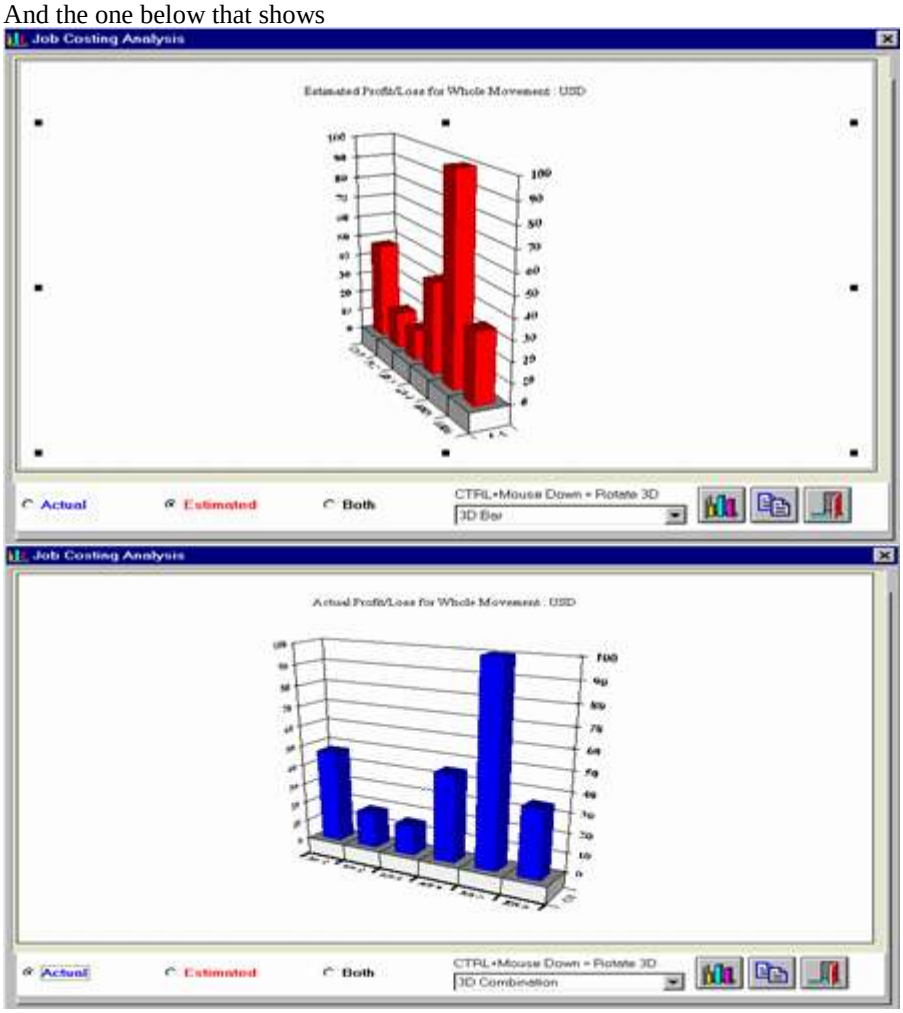




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Job Costing Analysis – Continued

Here is an example of a graph showing estimates. The one below shows estimtes
And the one below that shows

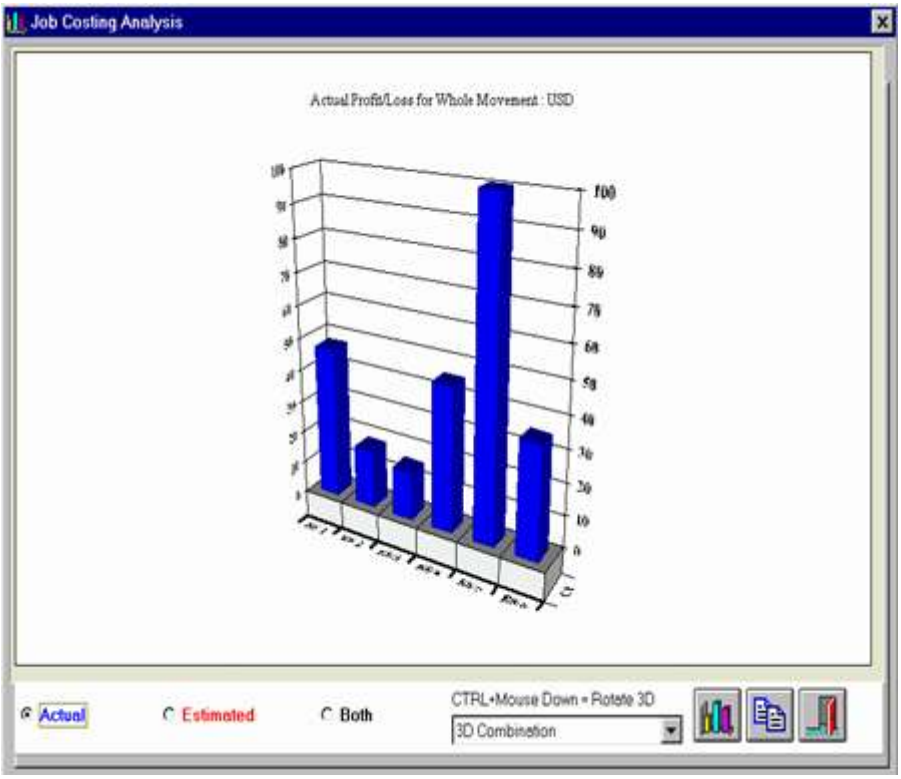


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Job Costing Analysis – Continued

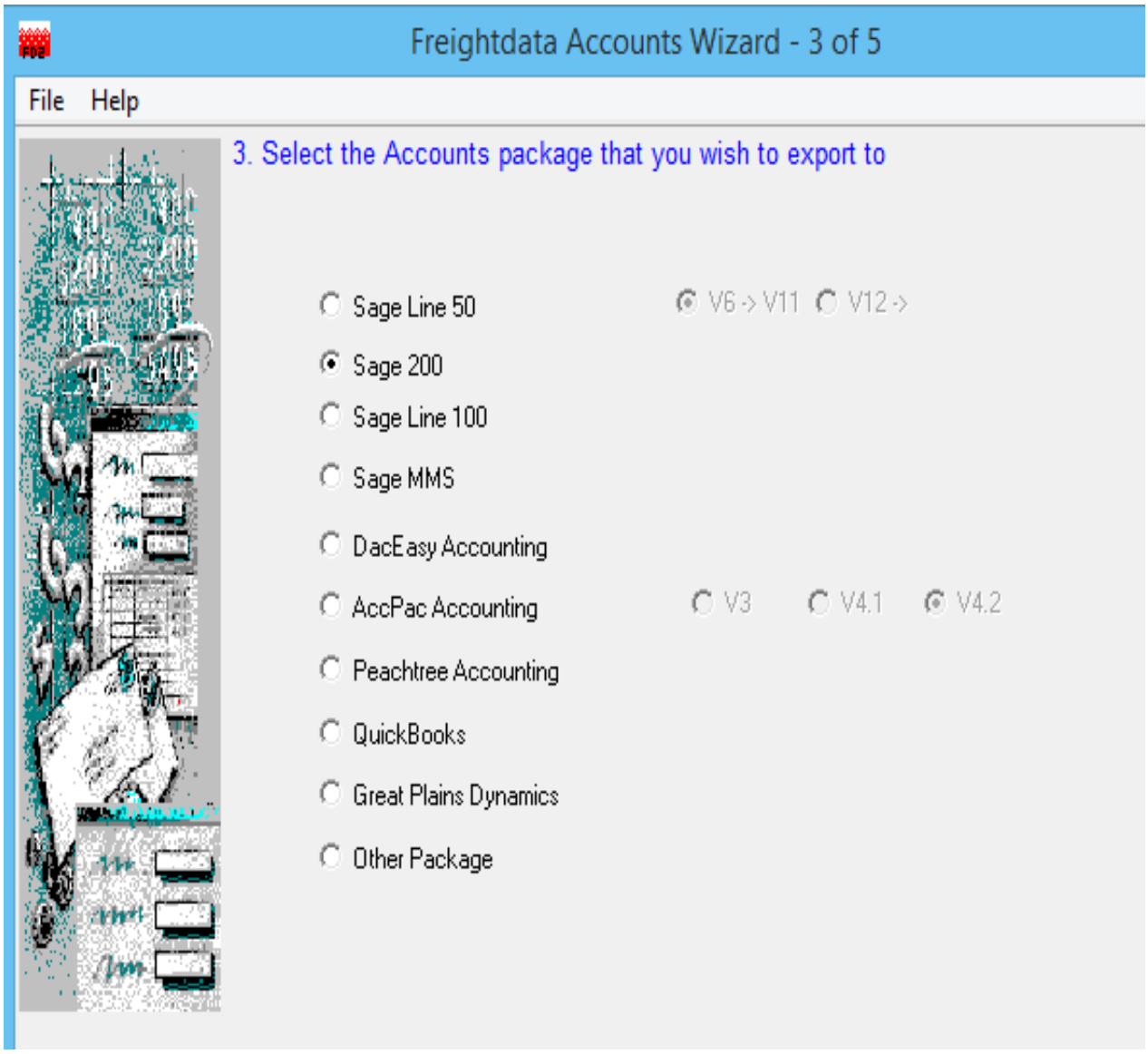
You can by pressing the CTRL+Mouse Down rotate the graphs for other views. You can also the copy the graph and data to other word products such as Microsoft word for business presentations. These copies can be located in your Windows “Clipboard”. Data can also be printed or sent over to MS Excel.





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Accounts Package Options



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The purpose of the Accounts Wizard is to facilitate the exportation and importation of data from Freightdata to your accounting package using a step-by-step approach to simplify the process.
The following data can be imported from your accounting package to Freightdata 2000:

- ***Customers***
- ***Suppliers***
- ***Exchange Rates*[1]**

The following data can be exported to your accounting package from Freightdata 2000*:*

- ***Customers***
- ***Suppliers***
- ***Invoices***
- ***Purchase Invoices***

Accounts packages supported

There is directly supported support for the major accounting packages, which include:

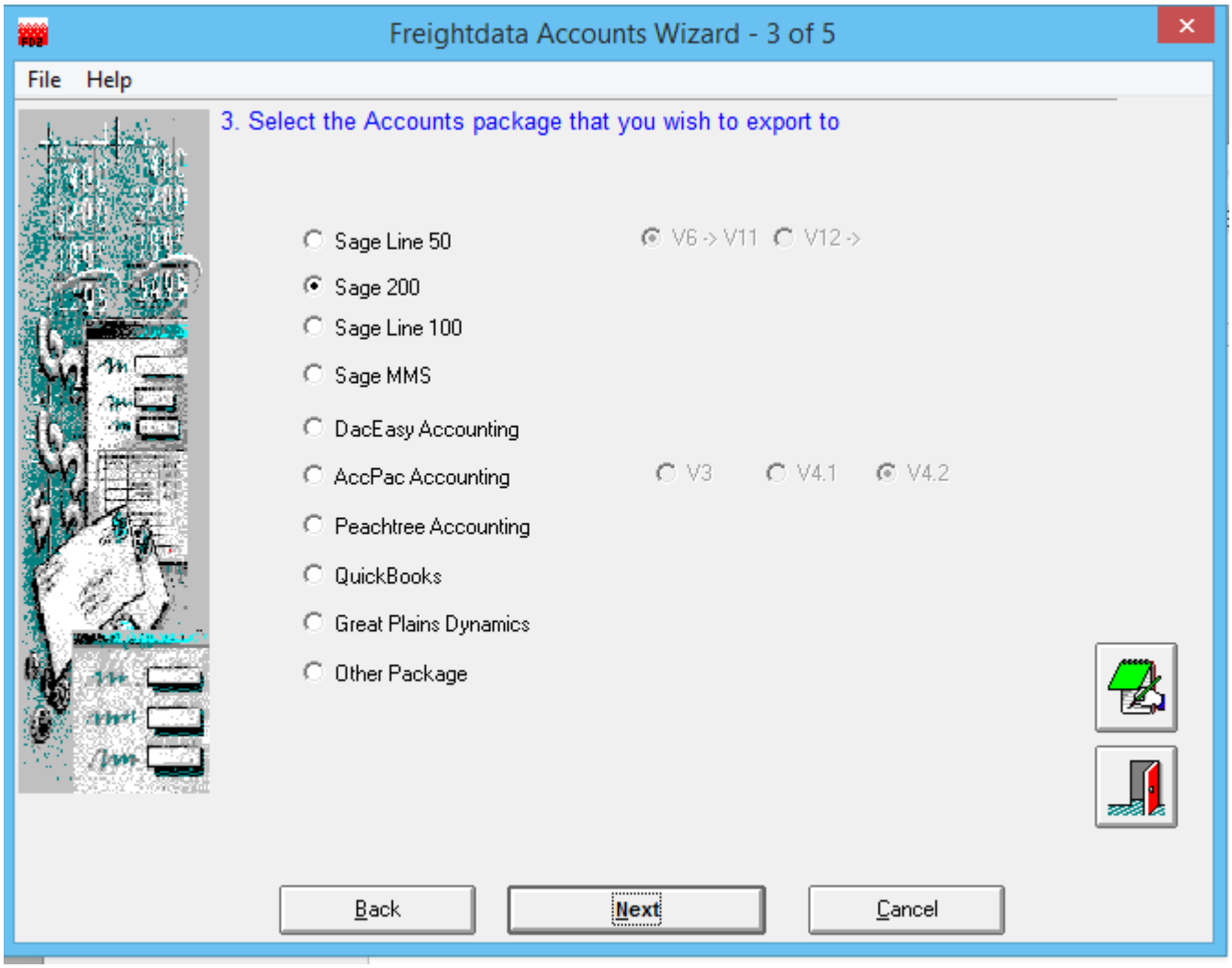
Sage Line 50 (version 4 and 5) Accounting

- ***Sage Line 100, 200, SMS Accounting***
- DacEasy Accounting
- AccPac Accounting
- Peachtree Accounting
- QuickBooks Professional
- Great Plains Dynamics (Exportation only)

Note: *1Exchange rates are only supported using AccPac

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If you are not using any of the above packages or you wish to export data to another package (for example Lotus 123 or a database program), you can use the custom export option to decide what you want to export and what format you want to export in.



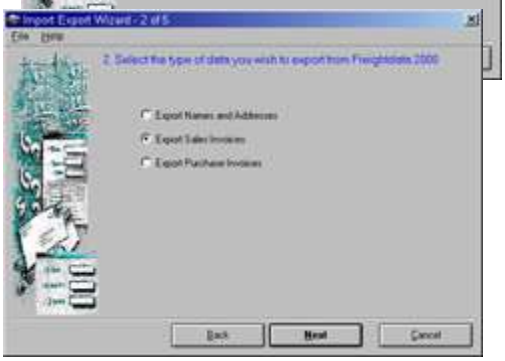
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Wizard Structure

The wizard has five steps, with the first three steps being common to all actions.
The first step requires you to select whether you want to export data or import data.



The second step will show what types of data you can import or export, depending on your choice in step 1.



The third step shows a list of the supported accounting packages. Select the package you require transferring data to/from or choose Other Package the option if the accounting package you use is not listed or you want to export custom data.

The fourth and fifth steps allow further configuration of the export options depending on the previous choices you have made and will be covered in greater detail further on.



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Note: If you are using an accounting package that is directly supported by the wizard then on step five ignore the list with the ticks by each field as this has no relevance to what is actually exported and is purely used for custom exports only.

Note: Some options will be unavailable if you have chosen a specific accounting package.

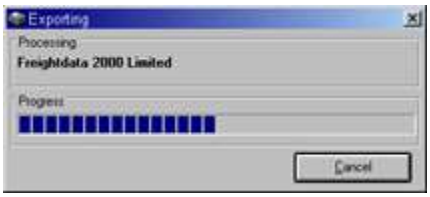
When all the options have been correctly configured press** Export Now/ Import Now **to display the windows selection box for you to either select a file to import or create a file to export.



If you are using a directly supported accounting package then the export format is limited to** CSV **format (Comma separated values), which is the format that most (if not all) accounting packages transfer data in. However, if you are using a custom format then you have the option of using either** CSV, TXT **(fixed length) or** MDB **(Microsoft Access) format.

Note: CSV is suitable for spreadsheet packages (such as Microsoft Excel), TXT format is suitable for word processing packages (such as Microsoft Word) as it presents the data in columnar format and MDB format is suitable for database packages (such as Microsoft Access).

The wizard will then process the import or export procedure automatically.



Warning: It is advised that you backup your company accounts before importation of any data (whether from Freightdata or another external data source).

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Freightdata 2000

How to Export Customers or Suppliers

1. Select the relevant options from the first three steps.

2. On step four, choose which addresses to export, either your sales, purchases or a combination of the two. You can also choose to export only altered Names (this would be normal for most Accounting links).

   In addition you can also export by Analysis field/fields by choosing from the drop-down lists. If you are exporting with 'Other Package' option selected, you will also export the contents of the Customer/Supplier Analysis fields.

   The Export Analysis Field can be enabled or disabled depending whether you want the

   Freightdata default analysis fields (set in Management Accounts Options – Defaults) exported to

   your accounting
   package.

   Note: The address options will be unavailable if you have selected one of the supported accounting packages. If you have selected a custom export then you have the choice of either a ***Single Line*** *for the address or using* ***Multiple Lines*** *(up to six).*

   For example, if the export data is being exported into Microsoft Excel then selecting single line address will put the entire address into a single cell whereas selecting six multiple lines will split the address into six cells.

3. On step five, choose whether to Include Field **Names** in the export or not. Checking this option will make the first row in the export the titles of the fields that are being exported.

   Note: Most accounting packages do not require field names, but this facility is included if you need to use a non-standard accounting package. You can match the fields in the export file to the fields your accounting packages requires to ensure you get the right order. Also for example, if exporting custom data into Microsoft Excel or another spreadsheet package the field names will become the column
   headers in a table.

   If you are using a custom export then you can select the fields you require to export by placing a tick next to the field in the list. All the fields are ticked by default (the account code and customer name can not be changed/unchecked as these are always required). Selecting Nominal Codes will include the nominal code and the tax code for that company.

   For a custom export you can press **Options** to change the export settings (see Setting the Wizard Options for further details).

4. Press **Export Now** to select a filename and location for the data to be exported to and the export process will begin.

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How to Export Invoices

1. Select the relevant options from the first three steps.

2. On step four you have the following choices to narrow the selection of invoices depending on your criteria. If you leave all these settings blank then every invoice that has not been previously posted will now be selected for export.

   You can export all invoices for all branches or just one branch and/or all departments or just one department.

   Selecting a filter range will further reduce your export size.

Filter by Date:

If you just enter a **from** date the all invoices on or after that date will be selected, or if you just enter a **to** date then all invoices up to and including that date will be selected. If both from and to are selected then all invoices that fall between the two dates will be selected.

Note: Press the hash button to display a calendar to make selecting dates easier and more accurate.

Filter by Invoice Number:

Works the same as filtering by date but using invoice numbers instead.

Filter by Currency:

This option allows only invoices made out in a particular currency will be selected.

3. On step five, choose whether to **Include Field Names** in the export or not. Checking this option will make the first row in the export the titles of the fields that are being exported.

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Note: Most accounting packages do not require field names, but as with the customers export this facility is included to get the right order.

If you have selected a custom export or chosen an accounting package that supports this feature, then **Include Invoice Items** will be checked.

This enables or disables the exportation of all of the individual items that make up the invoices to be exported as well as the main invoice details (the invoice header). This extra information can either be in a **Separate file** or in the **Same file** as the invoice header.

Note: If the invoice items are placed in the same file then the wizard will place the first line as the invoice header and that line will start with a '1'. Then the next few lines will be the invoice items (each entry on the invoice will be on a separate line) with each line starting with a '2'. This procedure will be repeated for each invoice exported.

If you are using a custom export then you can select the fields you require to export by placing a tick next to the field in the list. All the fields are ticked by default. Pressing **Options** will change the export settings (see Setting the Wizard Options for further details).

Note: for AccPac users see Appendix A for the required fields.

4. Press **Export Now** to select a filename and location for the data to be exported to and the export process will begin.

When you have exported the invoices these will then be marked as posted in Freightdata. You will not be able to export them again, unless you are using a custom export option. If this is the case they are not marked as posted, enabling you to export and re-export any set of invoices for you're own purposes.

For example you could export all invoices for a complete year to Microsoft Excel or Access to produce your own reports and graphs.

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How to Export Purchase Invoices

1. Select the relevant options from the first three steps.

2. On step four you have the following choices to narrow the selection of purchase invoices depending on your criteria. If you leave all these settings blank then every purchase invoice that has not been previously posted will now be selected for export.

   Selecting a filter range will further reduce your export.

Filter by Date:

   If you just enter a **from** date the all purchase invoices on or after that date will be selected, or if you just enter a **to** date then all purchase invoices up to and including that date will be selected. If both from and to are selected then all purchase invoices that fall between the two dates will be selected.

   Note: Press the hash button to display a calendar to make selecting dates easier and more accurate.

Filter by Invoice Number:

   Works the same as filtering by date but using invoice numbers instead.

Filter by Currency:

   This option allows only purchase invoices made out in a particular currency will be selected.

3. On step five, choose whether to **Include Field Names** in the export or not. Checking this option will make the first row in the export the titles of the fields that are being exported.

   Note: Most accounting packages do not require field names, but as with the customers export this facility is included to get the right order.

   If you have selected a custom export or chosen an accounting package that supports this feature, then **Include Purchase Items** will be checked.

   This enables or disables the exportation of all of the individual items that make up the purchase invoices to be exported as well as the main purchase invoices details (the purchase invoice header). This extra information can either be in a **Separate file** or in the **Same file** as the invoice header.

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Note: If the invoice items are placed in the same file then the wizard will place the first line as the purchase invoice header and that line will start with a '1'. Then the next few lines will be the purchase invoice *items (each entry on the invoice will be on a separate line) with each line starting with a '2'. This procedure will be repeated for each purchase invoice exported.*

If you are using a custom export then you can select the fields you require to export by placing a tick next to the field in the list. All the fields are ticked by default. Pressing **Options** will change the export settings (see Setting the Wizard Options for further details).

Note: for AccPac users see Appendix A for the required fields.

4. Press **Export Now** to select a filename and location for the data to be exported to and the export process will begin.

When you have exported the purchase invoices they will then be marked as posted in Freightdata. You will not be able to export them again, unless you are using a custom export in which case they are not marked as posted enabling you to export and re-export any set of purchase invoices for your own purposes.

For example you could export all invoices for a complete year to Microsoft Excel or Access to produce your own reports and graphs.

How to Import Customers or Suppliers

1. Select the relevant options from the first three steps.

2. On step four, select whether you are importing sales accounts or purchase accounts from your accounts package.

On step five, if the import file has the field names as the first line then select *Field Names are included* ***as this will cause the wizard to ignore the first line of the import file and only process the following lines. Only select this if you are sure your accounting package has included the field names otherwise the wizard will not import the first customer/supplier.***

If any errors occur or there are not valid account names or account codes for the companies you are importing then those entries in the import file will be rejected.

Note: If you are using a custom import then you can select the fields you require to import by placing a tick next to the field in the list. All the fields are ticked by default (the account code and customer name can not be changed/unchecked as these are always required).

Important: The order of fields in the import file must be in the same order as displayed in the list otherwise the wizard will assign incorrect data to the customer. For example if the telephone number field and the contact field are back to front then telephone numbers will be assigned to contact names and visa-versa.

There is no way the wizard can differentiate what is correct or not so it is important to ensure that the data to import is correct. This is not a problem when importing from one of the directly supported accounting packages, as the wizard knows the import structure. However, with a custom import file mistakes can be made and be difficult to correct by manually using the Accounts Set-up in Freightdata to edit the entries.

Selecting Nominal Codes will include the nominal code and the tax code for that company.

Note: for AccPac users see Appendix A for the required fields.

3. Press *Import Now* ***to locate the import file. The wizard will then perform some basic checks to ensure that the import file is valid and begin the import process.***

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How to Import Exchange Rates

1. Select the relevant options from the first three steps. There are no options on step four.

2. On step five, if the import file has the field names as the first line then select *Field Names are included* ***as this will cause the wizard to ignore the first line of the import file and only process the following lines. Only select this if you are sure your accounting package has included the field names otherwise the wizard will not import the first exchange rate.***

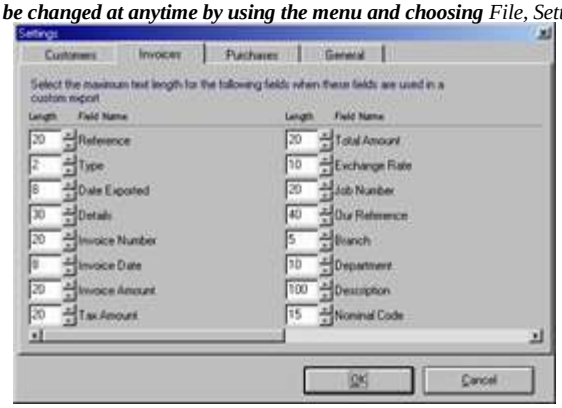
Note: This import will only replace a general tariff exchange rate and will not overwrite any special exchange rates you may have configured for a particular customer.

It also will only import exchange rates from your default currency to another currency rather than the other way around. For example, if your default currency is GBP then only GBP to USD will be imported, USD to GB will not.

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Setting the Wizard Options

The settings can be changed at anytime by using the menu and choosing** File, Settings **or by pressing the options button where available.



The values contained here are only used when processing custom exports and imports and are not required for the directly supported accounting packages.

There are four tabs,** Customers, Invoices, Purchases **and** General **and each tab contains many changeable values relevant to each tab heading. These values apply differently depending on the file format you are exporting to.

For CSV files they represent the maximum length that each field can be between quotes. For TXT files they represent the spacing between the columns and for MDB files they represent the field sizes of the database.

In CSV format for example this would be

Account Code,Company Name , Company Address1 , Company Address2 , Nom Code
EUR1,European Aircraft Corporation , Mill Inds Estate , Canal Road ,$000
FREIGHT0 , Freightdata 2000 Limited , Maidstone , England ,4000
FRE3, French Importation , Lyon Del Mar , France ,4000

In TXT format for example this would be

Account Code Company Name Company Address1 Company Address2 Nominal
EUR1 European Aircraft Corp Mill Inds Estate Canal Road 4000
FREIGHT0 Freightdata 2000 Limited The Old Rectory Sutton Road 4000
FRE3 French Importation Lyon Del Mar France $000

The default settings on installation should be acceptable for most uses but can be changed to your specification at anytime and will be used on all subsequent exports.

Under the general tab there is a box to enter a value that you wish entered should there be no value for this field currently being exported from Freightdata. This box can be left blank and only needs filling in if you require it.

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AccPac Accounting

When exporting to AccPac accounting the wizard will export a predefined field structure, which is suitable to import into AccPac.
When you import into AccPac all you need to do is select the fields from the list of available fields and follow the relevant AccPac importing procedure.

Customer/Supplier Export File Layout

Field Name	Type	Example
Account Code	Text	FD1
Currency Code	Text	GBP
Company Name	Text	Freightdata 2000 ltd
Company Address 1	Text	The Old Rectory
Company Address 2	Text	Sutton Road
Company Address 3	Text	Langley
Company Address 4	Text	Maidstone
Company Address 5	Text	Kent
Company Address 6	Text	
Post Code	Text	ME17 3LY
Country	Text	England
Contact Name	Text	A N Other
Telephone Number	Text	01622 861323
Fax Number	Text	01622 862807
Terms	Text	60 days
Vat Number(Tax ID Number)	Text	123456789

Invoices Export File Layout

Below is an example of invoice number '10' that contains one header and two items.
When you export Invoices you must specify a batch number for the export that is then used when importing the batch into AccPac accounting.

Invoice header file format

Field Name Record Type	Type	Example
Batch Number	Number	1
Entry Number	Number	100
Account Code	Number	10
Reference	Number	FD1
Type	Text	10
Description	Text	IN
Customer Name *	Text	1: Export, E1/1
Bill of Lading Number *	Text	Freightdata 2000 Ltd
Invoice Date	Text	AWB 110293
Currency Code	Date	01-Jan-99
Exchange Rate	Text	GBP
Terms	Number	1
Invoice Amount	Text	60 days
Tax Amount	Number	1000.00
Total Amount	Number	175.00
	Number	1175.00

Note: Fields marked with * must be removed before importation into AccPac otherwise the process will fail

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Invoice items (either in the same file as the invoice headers or a separate file)

Field Name	*Type*	*Example 1a*	*Example 1b*
Record Type	*Number*	***2***	***2***
Batch Number	*Number*	***100***	***100***
Entry Number	*Number*	***10***	***10***
Line Number	*Number*	***1***	***2***
Description	*Text*	***(E1/1) Freight***	***(E1/1) Terminal***
Invoice Amount	*Number*	***500.00***	***500.00***
Tax Amount	*Number*	***75.00***	***100.00***

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Purchase Invoices Export File Layout

Below is an example of purchase invoice number 'PurInv 1' that contains one header and two items.

When you export purchase invoices you must specify a batch number for the export.

Purchase invoice header file format

Field Name	Type	Example
Record Type	Number	1
Batch Number	Number	100
Entry Number	Number	11
Account Code	Text	FD1
Reference	Text	PurInv 1
Type	Text	IN
Description	Text	Office furniture
Customer Name *	Date	Freightdata 2000 Ltd
Invoice Date	Text	01-Jan-99
Currency Code	Number	GBP
Exchange Rate	Text	1
Terms	Number	60 days
Invoice Amount	Number	350.00
Tax Amount	Number	61.25
Total Amount	Number	411.25

Note: Fields marked with * must be removed before importation into AccPac otherwise the process will fail

Purchase invoice items (either in the same file as the invoice headers or a separate file)

Field Name	Type	Example 1a	Example 1b
Record Type	Number	2	2
Batch Number	Number	100	100
Entry Number	Number	11	11
Line Number	Number	1	2
Description	Text	Supply of chairs	Supply of tables
Invoice Amount	Number	250.00	100.00
Tax Amount	Number	43.75	17.50

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Great Plains Dynamics

When exporting to Great Plains Dynamics, you must have the Integration Manager installed.

If you do not have this module installed it is available as a downloadable upgrade (DIM50SP1.EXE) available from the Great Plains FTP web site or by contacting your Great Plains partner.

The Integration Manager has default 'Queries' which can be used for the importation of data from Freightdata, although these are not very comprehensive.

Should these default queries not be suitable, additional queries can be created. Refer to your Great Plains manuals/help files for instructions on how to accomplish this.

Note: Usage for the Integration is relatively complicated and it is advised that you try a test import on the supplied demonstration company data within Great Plains before using your actual company data

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