

DESCARTES™ Aljex

NEW FEATURES & NOTIFICATIONS
(7/9/2018)

Missed Appointment Notifications: Job # 31615

Setup:

- In the Customer Profile, a new sub-section has been added entitled “Missed Appointment Notification”

The screenshot shows a web form for customer profile setup. At the top, there are input fields for 'Fax #' and 'Email'. Below this is a section titled 'AP Contact' with fields for 'Name', 'Email', 'Phone', and 'Fax'. The 'Missed Appointment Notification' section is highlighted with a red box and contains five checkboxes: 'Sales Rep', 'Assigned Dispatcher', 'Actual Dispatcher', 'Created By', and 'Service Rep'. Below this is a 'Credit USD' section with 'D&B Rate' and 'D&B Date' fields. 'top' links are visible on the right side of the notification and credit sections.

- In this section, the different roles which could be associated with a shipment can be selected. Selection options include:
 - Sales Rep
 - Assigned Dispatcher
 - Actual Dispatcher
 - Created By
 - Service Rep
- A user can select or ‘check’ each person whom they would like to be notified in the event of a missed appointment for that particular customer.

This is a close-up of the 'Missed Appointment Notification' section from the previous screenshot. It shows the five checkboxes with their selection status: 'Sales Rep' is checked, 'Assigned Dispatcher' is unchecked, 'Actual Dispatcher' is checked, 'Created By' is unchecked, and 'Service Rep' is checked. Each checked checkbox is enclosed in a red box. The 'Credit USD' label is visible below the checkboxes.

- The Users selected in the Customer Profile will be notified via email in the event of a missed appointment.
- The User Setup File for the User selected must have an email address on file in order to receive the notification:

*First Name	<input type="text" value="SALES"/>	*Last Name	<input type="text"/>
Address	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
Social Sec #	<input type="text"/>	User Type	<input type="text"/>
Hire Date (MM/DD/YY)	<input type="text"/>	Start Date (MM/DD/YY)	<input type="text"/>
*Login	<input type="text" value="sales"/>	*Password	<input type="text"/>
*Accounting	<input type="radio"/> Yes <input checked="" type="radio"/> No	Phone	<input type="text"/>
Fax	<input type="text" value="(214) 720-2446"/>	Cell Phone	<input type="text"/>
Emergency Contact	<input type="text"/>	Emergency Phone	<input type="text"/>
Email Address	<input type="text" value="mustbefilledin@aljex.com"/>		
IM User ID	<input type="text"/>	IM Client	<input type="text"/>

Functionality:

- When an 'Arrived' time at any location is entered which is later than a specified Appointment at that location, an email notification will be sent to the contacts specified in the Customer Profile for that particular Customer
- The Pick or Stop MUST have an Appointment Date AND Time in order to trigger the email notification.

Example:

- In the Customer File for customer Aljex Software, Assigned Dispatcher, Actual Dispatcher, Created By, and Service Rep are selected for Missed Appointment Notifications:
 - Assume all users have an email address on file in the User File

Missed Appointment Notification					
<input type="checkbox"/> Sales Rep	<input checked="" type="checkbox"/> Assigned Dispatcher	<input checked="" type="checkbox"/> Actual Dispatcher	<input checked="" type="checkbox"/> Created By	<input checked="" type="checkbox"/> Service Rep	
Credit USD					

- On a shipment for Aljex Software, an appointment is established at Pickup 1 on 4/25/18 @ 12:00
- The Arrival Date and Time is entered, marking the truck Arrived at Pickup 1 on 4/25/18 @ 12:02. This is 2 minutes past the scheduled appointment

Pro # 72737		Extra Picks and			
Type LB	Status COVERED	Ready Date 04/25/18	Origin ANTHONY KS	Loaded	
Customer ALJEX, SOFTWARE THIS I	Carrier AA EXPRESS & LOGISTI	Destination OVIEDO FL	Delivered		
Number 1	Pick/Stop P	Appointment (Y/N)	Appt Note	Seal	Reference
Name A & H BONHAM FARMS LLC	Appt Date 04/25/18	Appt Time 12:00	Hours	Reference	
Address 182 NE 40TH AVE TESTIN	Arrival Date 04/25/18	Arrival Time 12:02	Weight	Reference	
Address	Departed Date	Departed Time	Pieces	Reference	
City ANTHONY	State KS	Zip	Received by	Pallets	Reference
Phone	Comments				Reference
Phone	Comments				Reference
Phone	Comments				Reference
					Account # 103803
					<input type="button" value="Insert Above"/> <input type="button" value="Delete"/>

- An email notification is triggered to to the Assigned Dispatcher, Actual Dispatcher, User who Created the load, and the Service Rep
 - Sample email:

Customer: ALJEX, SOFTWARE THIS IS THE BE

Pro #: 72737

From: A & H BONHAM FARMS LLC
ANTHONY KS

To: ALJEX
OVIEDO FL

Reference Nos.: 99977744

Pick/Stop No.: 1
Location: ANTHONY KS

Appointment: 04/25/18 12:00

Arrived: 04/25/18 12:02