



# Yardmaster Truck™

## Overview Guide - Version 17.2.4

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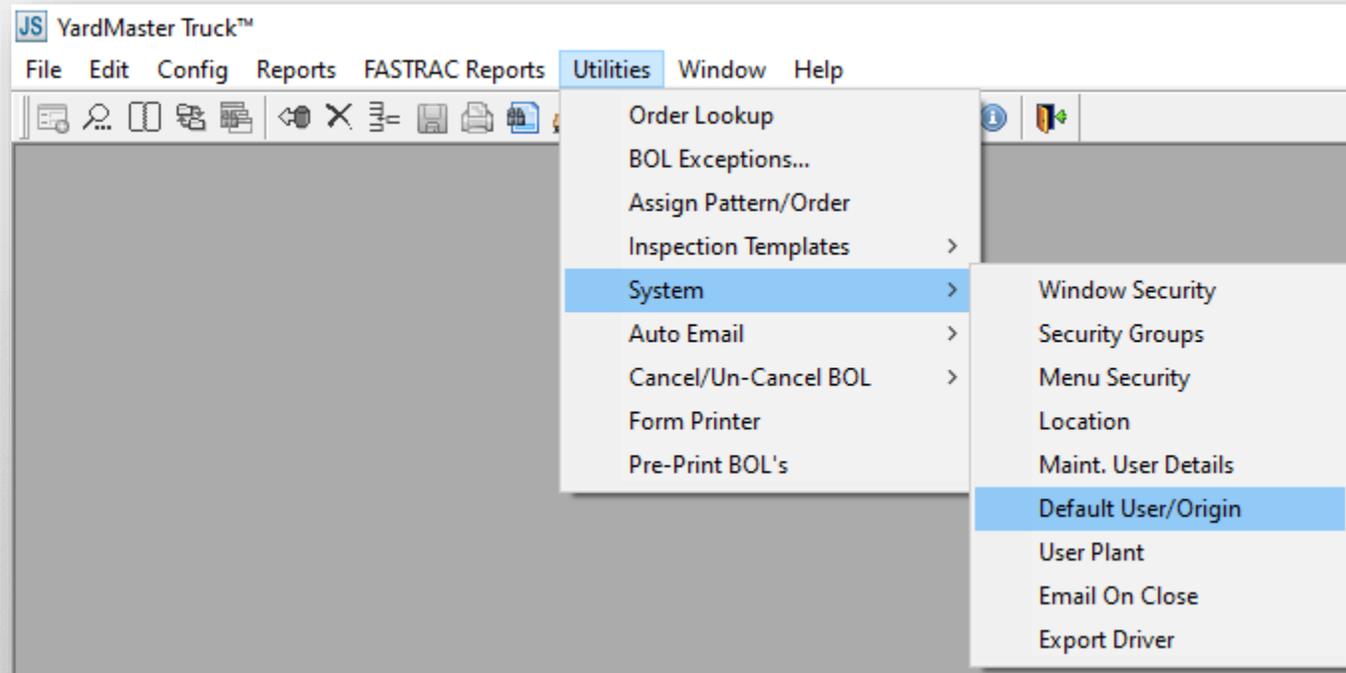
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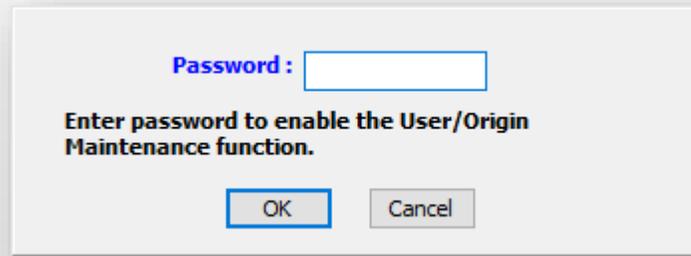
# User Setup - Default User Origin

- ▶ Origin Security dictates what origins/plant locations a user has access to.
- ▶ The Origin Security menu can be found via Utilities - System - Default User/Origin:



# User Setup - Origin Security Password

- ▶ Once you click on the Default User/Origin option, you will be prompted with a popup requesting a password.

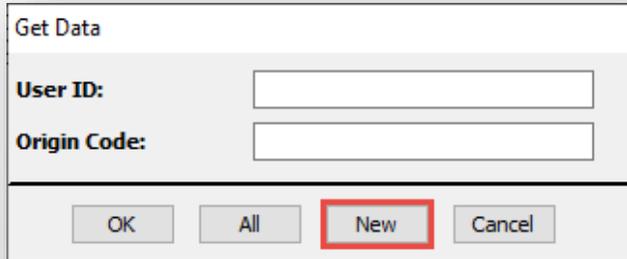


A screenshot of a software dialog box. At the top, it says "Password:" followed by a text input field. Below the input field, the text reads "Enter password to enable the User/Origin Maintenance function." At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

- ▶ The password is always the current **month**, **year**, **day** and the numbers **898**.
  - ▶ So for example, if the current date is 01/31/2020 then the password would be:
    - ▶ **01202031898**

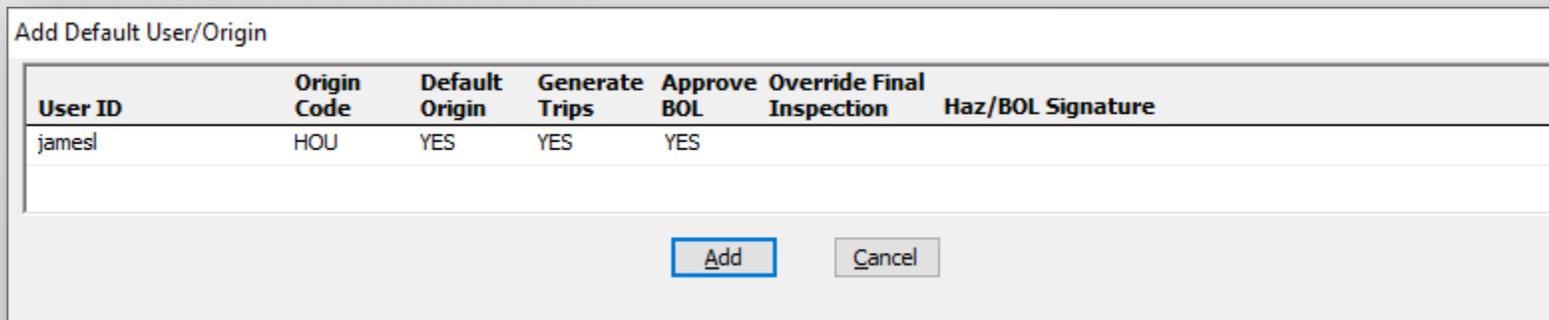
# User Setup - Adding an Origin for a user

- ▶ Once you enter the Maintain Default User/Origin, a Get Data popup will appear. Click on New to set up an origin for a user.



The 'Get Data' popup window contains two input fields: 'User ID:' and 'Origin Code:'. Below these fields are four buttons: 'OK', 'All', 'New' (highlighted with a red border), and 'Cancel'.

- ▶ From here, select the User's ID from the drop down, what origin you would like to assign them to, if this origin is the user's default origin and if the can generate trips/approve BOLs.



The 'Add Default User/Origin' window displays a table with the following data:

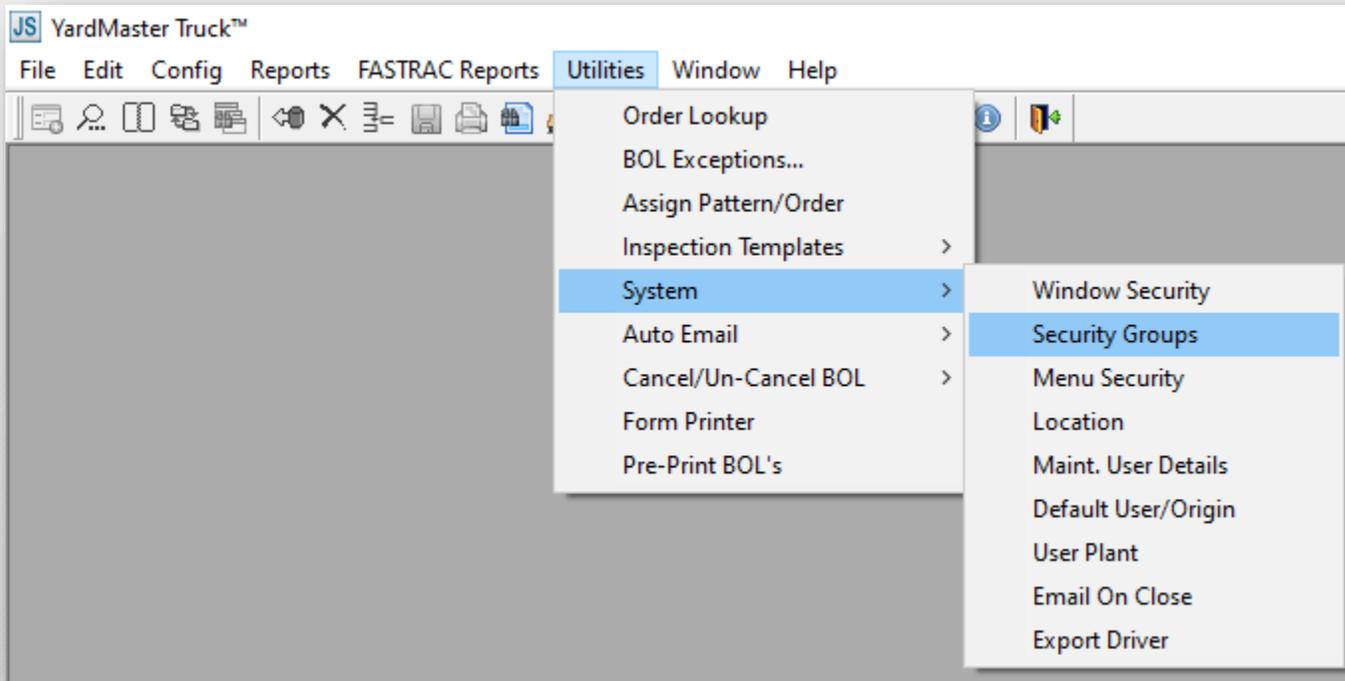
User ID	Origin Code	Default Origin	Generate Trips	Approve BOL	Override Final Inspection	Haz/BOL Signature
jamesl	HOU	YES	YES	YES		

Below the table are two buttons: 'Add' and 'Cancel'.

- ▶ A user can only have one default origin at a time. If you are prompted with an error message when you try to add another default origin for a user, then set the flag to NO.
- ▶ The Generate Trips and Approve BOL flags are to allow the user to make any changes to the data. If set to NO, then the user only has READONLY privileges, meaning they can only view orders and not ship or make any type of changes to the order(s).

# User Setup - Menu Security Groups

- ▶ The Security Groups menu requires you to add a user to a specific Security Group, which then dictates their role and access in Yardmaster Truck.
  - ▶ The Security Group menu can be found via Utilities - System - Security Groups:



# User Setup - Adding a user to a Group

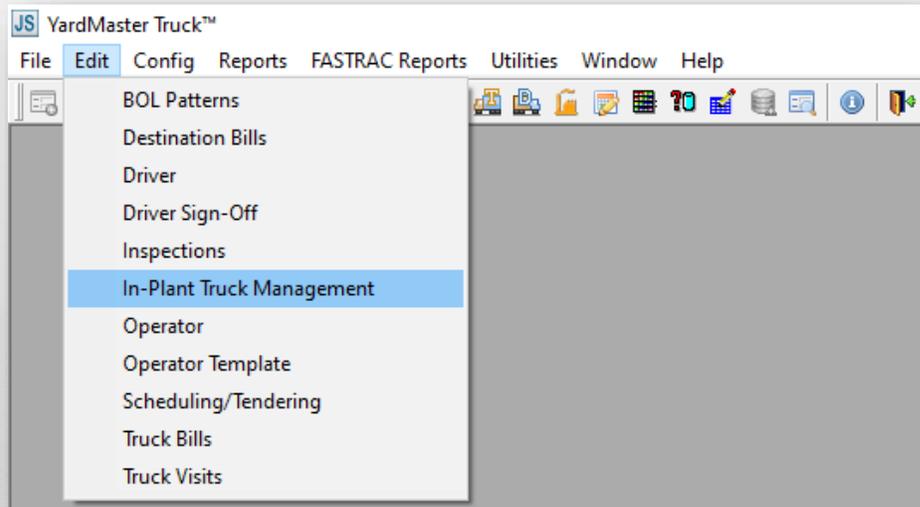
- ▶ Once you enter the screen, navigate to the group you want to add the new user to and click on the dropdown in the middle column and find their User ID to add them to the security group

Group ID	Description	Security Group Users	Menu Options
ADMIN	ADMIN	jamesl	Edit-In-Plant Truck Management
GUARD	THIS IS A GUARD GROUP		

- ▶ On the right hand side, you can see what are the different menu options that security group has access to.
- ▶ Once you're satisfied with the change, please save and have the user relog into Yardmaster Truck.

# In-plant - Getting Started

- ▶ Users can navigate to the In-Plant Truck Management screen via Edit - In-Plant Truck Management.

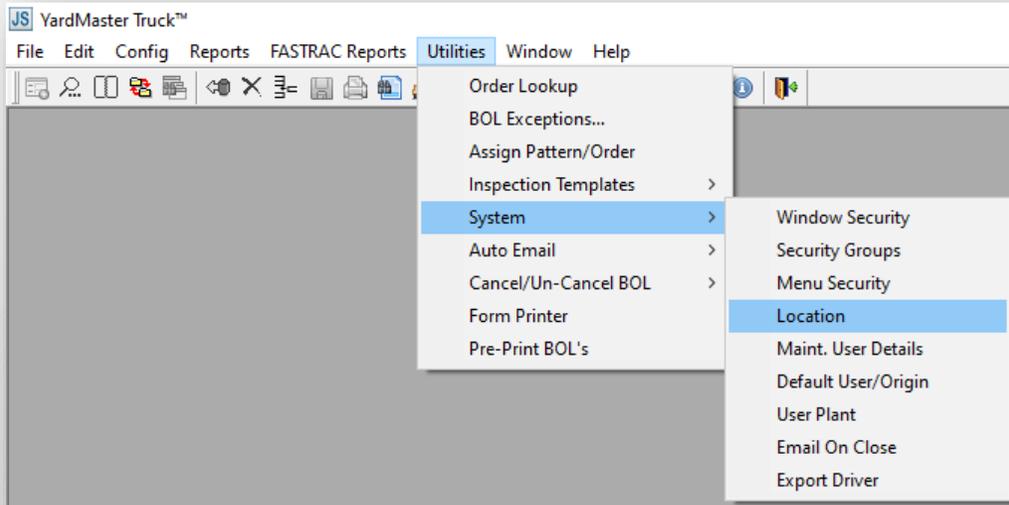


- ▶ Alternatively, users can also click on the In-plant shortcut icon located at the top menu.



# In-plant - Tab Customization

- ▶ Users can customize a location's In-plant screen by navigating to the Location screen via Utilities - System - Location



- ▶ From there, users can select a location and select from a series of Yes/No dropdown boxes on what tabs they want enabled.

Truck Management

Inplant Tabs

Use Check-In:	YES	Use Default Trailer ID:	
Use BLK/Use PKG:	YES NO	Default Truck ID Value:	
Use Completed:	YES	Default Trailer ID Value:	
Use Check-Out:	NO	Truck /TrailerID Length:	
Use Check-In Truck:	NO	Use Check-In Trailer:	YES
Use Check-Out Truck:	NO	Use Check-Out Trailer:	
Use Completed Truck:	NO	Use Completed Trailer:	
Use Check-In Container:	NO	Use Inventory:	YES
Use Check-Out Container:	NO	Use Location:	YES
Use Completed Container:	NO		

# In-plant - Check-In Tab

- ▶ This tab allows users to Check-In BOLs.
  - ▶ Users can start by selecting from the below list, filling out the fields with **Blue** text and clicking on the Check-In button (highlighted in **Red**).
  - ▶ Users can also use the Get Data (highlighted in **Orange**) to find a specific BOL.

**In-Plant Truck Management**

Plant: HOU-HOUSTON, TX Get Data Refresh

**Check In Pick Up** Load BLK Load PKG Completed

Find: BOL NO. Like: Find Filter

Truck:  Truck Tare: 0 Carrier: TNDT TANDET LOGISTICS Arrival D/T: 00/00/0000 00:00  
Trailer:  Trailer Tare: 0 Oper Carrier: TNDT TANDET LOGISTICS Tag ID:   
Equipment:  Total Tare:  0  
Operator: jamesl  
Scale Tkt:   
Status: NEED CHECK-IN

Product	Order Qty	UOM
R-125 - R-125	10.00	TON

BOL No.	Customer	Origin	Destination	Requested Delivery Date	Requested Load Date
BOURQUE-BULK	NICHIMAN	HOUSTON, TX	HOUSTON, TX	02/18/19 10:46	00/00/00 00:00
BOL Status: <span>READY</span> PO No.: PO REFERENCE TEST Care of: BOURQUE LOGISTICS Freight Payer: STOLT-NIELSEN USA, INC Load Type: BLK Sched. Status: <span>SCHEDULED</span> Ref: <span>Ref</span> Ship Instr: <span>Ship Instr</span> Comments: <span>Comments</span>					
BOURQUE-MULTI	BOURQUE LOGISTICS	HOUSTON, TX	BRIDGEVIEW, IL	02/18/19 10:46	00/00/00 00:00
BOL Status: <span>READY</span> PO No.: PO REFERENCE TEST Care of: BOURQUE LOGISTICS Freight Payer: FACTOR GAS LIQUIDS Load Type: BLK Ref: <span>Ref</span> Ship Instr: <span>Ship Instr</span> Comments: <span>Comments</span>					
DEMO-1-1	CYTEC CANADA INC	HOUSTON, TX	NIAGRA FALLS, ON	02/18/19 10:58	00/00/00 00:00
BOL Status: <span>READY</span> PO No.: PO REFERENCE TEST Care of: BOURQUE LOGISTICS Freight Payer: LANNESS CORPORATION Load Type: BLK Ref: <span>Ref</span> Ship Instr: <span>Ship Instr</span> Comments: <span>Comments</span>					
DEMO-1-2	EQUISTAR	HOUSTON, TX	CHANNELVIEW, TX	02/18/19 10:58	00/00/00 00:00
BOL Status: <span>READY</span> PO No.: PO REFERENCE TEST Care of: BOURQUE LOGISTICS Freight Payer: PHILLIPS 66 COMPANY Load Type: BLK Sched. Status: <span>SCHEDULED</span> Ref: <span>Ref</span> Ship Instr: <span>Ship Instr</span> Comments: <span>Comments</span>					
DEMO-1-3	BP CANADA ENERGY	HOUSTON, TX	SARNIA, ON	02/18/19 10:59	00/00/00 00:00
BOL Status: <span>READY</span> PO No.: PO REFERENCE TEST Care of: BOURQUE LOGISTICS Freight Payer: EQUISTAR CHEMICALS Load Type: BLK Sched. Status: <span>SCHEDULED</span> Ref: <span>Ref</span> Ship Instr: <span>Ship Instr</span> Comments: <span>Comments</span>					
DEMO-2-1	ACCRON	HOUSTON, TX	FORT WAYNE, IN	02/18/19 10:59	00/00/00 00:00
BOL Status: <span>READY</span> PO No.: PO REFERENCE TEST Care of: BOURQUE LOGISTICS Freight Payer: DYNEGY MIDSTREAM SER Load Type: PKG Ref: <span>Ref</span> Ship Instr: <span>Ship Instr</span> Comments: <span>Comments</span>					

**13 Record(s) Ready for Check-In**

**Check-In** Modify BOL Change Dest. Print Load Tkt. Save Visit

# In-plant - Load Bulk/Package Tabs

- ▶ These tabs allows users to load checked-in bulk or package BOLs.
  - ▶ Users can start by selecting from the below list, filling out the fields with **Blue** text and clicking on the Ship/Ship Confirm button (highlighted in **Red**).
  - ▶ Users can also use the Get Data (highlighted in **Orange**) to find a specific BOL.

In-Plant Truck Management

Plant: HOU-HOUSTON, TX Get Data Refresh

Check In Pick Up Load BLK Load PKG Completed

Find: BOL NO. Like: Find Filter

Truck: 69308 Truck Tare: 0 Carrier: TNWI TRANSWOOD Arrival DT: 01/29/2013 16:22  
Trailer: 7085 Trailer Tare: 0 Oper Carr.: TNWI TRANSWOOD Load Start DT: 00/00/0000 00:00  
Equipment: CHEMICAL TRAILER Total Tare: 0 DOT#: Load End DT: 00/00/0000 00:00  
Pup: Gross (Lbs): 0 Storage. Loc.: Ship DT: 00/00/0000 00:00  
Operator: jamesl Net (Lbs): 0 Load Rack: Product: 3262 - TRIPROPYLENE (NONENE)  
Scale Tkt: Gross Gal's: 0 LBS /Gal 60: 0.0000 Comm Ref1:  
Ticket No.: Net Gal's: 0 Req Gross Wt: 80,000.0000 UM: LBS Comm Ref2:  
FOB: ORIGIN Status: PRELOAD Req Qty: 80,000.0000 UM: LBS Comm Ref3:  
Order: 4516374 (52,000.0LBS) Load Qty: 52,000.0000 UM: LBS Comm Ref4:  
Vapor Press: Corr Fact: .0000 Gravity: .00 Odor Amount: .0000  
Loaded %: Load Temp: .0 Capacity:

Truck BOL No.	Dest BOL	Customer	Origin	Destination	Requested Delivery Date	Requested Load Date
4516374	4516374	TWG - INTERNAL	HOUSTON, TX	GALENA PARK, TX	09/01/2016	00/00/00 00:00
BOL Status: READY PO/Rel: Ref: Ship Instr: Comments:						
EDI Status: R Product: TRIPROPYLENE (NONENE)						
4516375	4516375	TWG - INTERNAL	HOUSTON, TX	GALENA PARK, TX	09/01/2016	00/00/00 00:00
BOL Status: READY PO/Rel: Ref: Ship Instr: Comments:						
EDI Status: R Product: TRIPROPYLENE (NONENE)						
4516379	4516379	TWG - INTERNAL	HOUSTON, TX	GALENA PARK, TX	09/01/2016	00/00/00 00:00
BOL Status: READY PO/Rel: Ref: Ship Instr: Comments:						
EDI Status: R Product: TRIPROPYLENE (NONENE)						
4516381	4516381	TWG - INTERNAL	HOUSTON, TX	GALENA PARK, TX	09/01/2016	00/00/00 00:00
BOL Status: READY PO/Rel: Ref: Ship Instr: Comments:						
EDI Status: R Product: TRIPROPYLENE (NONENE)						
4516382	4516382	TWG - INTERNAL	HOUSTON, TX	GALENA PARK, TX	09/01/2016	00/00/00 00:00
BOL Status: READY PO/Rel: Ref: Ship Instr: Comments:						
EDI Status: R Product: TRIPROPYLENE (NONENE)						

17 Bulk Record(s) Ready for Loading/Shipping

Preload Complete  
Seals  
Modify BOL  
Change Dest.  
Print Load Tkt.  
Undo Check-In  
Change Prod.  
Ship/Ship Confirm  
Print BOL  
Preview BOL  
Assign Carrier  
Change Dates  
Order Extract  
Transload  
Multi Stg. Facility  
Save  
Comm Load

Users can reset a BOL back to the Check-In tab by clicking on the Undo Check-In button (highlighted in **Green**).

# In-plant - Completed Tab

- ▶ This tab allows users to view their Completed BOLs.
  - ▶ Users can reset a BOL back to the Load Bulk/Package tab by clicking on the Undo Check-Out button (highlighted in Red).
  - ▶ Users can also use the Get Data (highlighted in Orange) to find a specific BOL.

The screenshot displays the 'In-Plant Truck Management' application window. At the top, the 'Plant' is set to 'HOU-HOUSTON, TX'. There are buttons for 'Get Data' (highlighted in orange) and 'Refresh'. Below this, there are navigation buttons: 'Check In Pick Up', 'Load BLK', 'Load PKG', and 'Completed' (which is the active tab). A search area contains 'Find: BOL NO.' and 'Like:' fields, with 'Find' and 'Filter' buttons. The main area features a table with the following data:

BOL No.	Carrier	Truck ID	Trailer ID	Ship Date	Customer	Shipper
4516404	TNWI	1	1	01/28/20 10:51	TWG - INTERNAL	TWG

Additional details for the selected record: Dest.: GALENA PARK, TX; Bill To: TWG GROUP; Order No.: ; PO: ; Load Type: ; Commodity: ; Status: SENT; Ship Confirm DT: 01/28/20 10:52; Net WT: 10,000.0000.

On the right side of the table, there are three buttons: 'Undo Check-Out' (highlighted in red), 'Print BOL', and 'Preview BOL'. Below these is a 'Print Load Tkt.' button. At the bottom left, it says '1 Completed Record(s)'.

# In-plant - Check-In Truck/Trailer/Container

- ▶ These tabs allows users to check-in either a Truck, a Truck and Trailer or a Truck, Trailer and a Container.

## Check-In Truck

Truck ID:	<input type="text"/>	Carrier:	<input type="text"/>	Arrival:	<input type="text" value="00/00/0000 00:00"/>
Driver:	<input type="text"/>	Truck Tare:	<input type="text" value=".0000"/>		
Driver ID:	<input type="text"/>				
Driver Cert:	<input type="text"/>				
Approver:	<input type="text"/>				

## Check-In Trailer

Truck ID:	<input type="text"/>	Carrier:	<input type="text"/>	Arrival:	<input type="text" value="00/00/0000 00:00"/>
Chassis/Trailer No.:	<input type="text"/>	Yard:	<input type="text"/>		
Chassis/Trailer Type:	<input type="text"/>	Lot:	<input type="text"/>		
Chassis/Trailer Source:	<input type="text"/>	Spot:	<input type="text"/>		
Hotlist:	<input type="text"/>	Commodity:	<input type="text"/>		
Fleet ID:	<input type="text"/>	Weights			
Business Group:	<input type="text"/>	Truck Tare:	<input type="text" value=".0000"/>		
Driver:	<input type="text"/>	Chassis/Trailer Tare:	<input type="text" value=".0000"/>		
Driver ID:	<input type="text"/>	Total Tare:	<input type="text" value=".0000"/>		
Driver Cert:	<input type="text"/>				
Approver:	<input type="text"/>				

## Check-In Container

Truck ID:	<input type="text"/>	Carrier:	<input type="text"/>	Arrival:	<input type="text" value="00/00/0000 00:00"/>
Chassis/Trailer No.:	<input type="text"/>	Container ID:	<input type="text"/>	I/B Order No.:	<input type="text"/>
Chassis/Trailer Type:	<input type="text"/>	Container Init. / No.:	<input type="text"/>	I/B Delivery No.:	<input type="text"/>
Chassis/Trailer Source:	<input type="text"/>	Container Source:	<input type="text"/>	O/B Order No.:	<input type="text"/>
Hotlist:	<input type="text"/>	Hotlist:	<input type="text"/>	O/B Delivery No.:	<input type="text"/>
Yard:	<input type="text"/>	Container Type:	<input type="text"/>		
Lot:	<input type="text"/>	Condition:	<input type="text"/>		
Spot:	<input type="text"/>	Commodity:	<input type="text"/>		
Fleet ID:	<input type="text"/>	Weights			
Business Group:	<input type="text"/>	Truck Tare:	<input type="text" value=".0000"/>	Container Tare:	<input type="text" value=".0000"/>
Driver:	<input type="text"/>	Chassis/Trailer Tare:	<input type="text" value=".0000"/>	Total Tare:	<input type="text" value=".0000"/>
Driver ID:	<input type="text"/>	Truck/Trailer Tare:	<input type="text" value=".0000"/>	Container Gross:	<input type="text" value=".0000"/>
Driver Cert:	<input type="text"/>			Container Net:	<input type="text" value=".0000"/>
Approver:	<input type="text"/>				
Last Trip Comment:	<input type="text"/>				

- ▶ Users select between the different tabs from the Check In dropdown.

Check In:	<input type="text" value="Check-In Container"/>
	<input type="text" value="Check-In Container"/>
	<input type="text" value="Check-In Trailer"/>
	<input type="text" value="Check-In Truck"/>

- ▶ To Check-In, start by filling out the fields with **Blue** text and clicking on the Ship/Ship Confirm button (highlighted in **Red**).

<input type="button" value="Check In"/>
<input type="button" value="Seals"/>
<input type="button" value="Hotlist"/>

# In-plant - Inventory Tab

▶ This tab allows users to manage checked-in Trailers and Containers

Chassis/Trailer:  Container ID:

Chassis/Trailer: 000	Container ID:	Commodity:
Type: UNKNOWN	Type:	Yard:
Arrival: 9/20/2019 09:14:35	Arrival:	Lot:
Days on Site: 130	Days on Site:	Spot:
Hotlist: NO	Hotlist:	Order No:
Tare: .0000	Tare:	Delivery No.:
Review Date:	Total Tare:	Comments: None
Review User:	Gross:	Condition:
	Net:	Status:

Chassis/Trailer	Chassis/Trailer Type	Container ID	Equipmen Type	Condition	Equipmen Status	Commodity
000	UNKNOWN					
0000	UNKNOWN					
152	UNKNOWN	T152	CYL/RD/TT/RK	LOADED	OK	10146426
20409	CHASSIS		ISO TANK	LOADED	OK	10143798
323	CHASSIS	T-323	ISO TANK	LOADED	OK	10143273
380088	UNKNOWN		ISO TANK	LOADED	OK	10146426
413	CHASSIS	T-413	ISO TANK			
443	UNKNOWN	T443				
452	CHASSIS	E452	ISO TANK	LOADED	OK	10146426
4700508725	UNKNOWN					
717	CHASSIS	717717	ISO TANK	LOADED	OK	10143826
743	CHASSIS	T743	ISO TANK	LOADED	OK	10632415
754	UNKNOWN	T754	UNKNOWN			
767	UNKNOWN	T767	CYL/RD/TT/RK			
779	CHASSIS	TT779	ISO TANK			
791	UNKNOWN	T791	CYL/RD/TT/RK			
793	UNKNOWN	T793	CYL/RD/TT/RK			

207 Record(s)

- Save
- Ground
- Undo Check In
- Comments
- Delete Comm.
- Review
- Hotlist
- Assign Order

▶ Users remove the record by clicking on the Undo Check-In button (highlighted in Green).

# In-plant - Location Tab

- ▶ This tab allows users to manage the locations of checked-in Trailers and Containers.

Chassis/Trailer: <input type="text"/>		Container ID: <input type="text"/>	
Chassis/Trailer: 1	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>
Chassis/Trailer: 2	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>
Chassis/Trailer: 69308	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>
Chassis/Trailer: 69310	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>
Chassis/Trailer: 7066	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>
Chassis/Trailer: 7066	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>
Chassis/Trailer: 7066	Container ID:	Yard:	<input type="text"/>
Type:	Type:	Lot:	<input type="text"/>
		Spot:	<input type="text"/>

24 Record(s)

# In-plant - Check-Out Truck/Trailer/Container

- ▶ These tabs allows users to check-out either a Truck, a Truck and Trailer or a Truck, Trailer and a Container.

Chassis/Trailer:	Container ID:	Commodity:	Arrival:
Chassis/Trailer: 152	Container ID: T152	Commodity: 1234ZE BULK	Arrival: 12/17/19 03:26
Type: UNKNOWN	Container Type: CYL/RD/TT/RK	Yard:	
Driver: UNKNOWN	Condition: LOADED	Lot:	
Driver ID:	Status: OK	Spot:	
Driver Cert:	Tare Weight: .0000	Order No:	
Carrier:	Gross Weight: .0000	Delivery No:	
Truck ID:	Net Weight: .0000	Comments: Comments Exist	
Chassis/Trailer: 20409	Container ID: D-527	Commodity: 10143798	Arrival: 06/10/19 00:00
Type: CHASSIS	Container Type: ISO TANK	Yard: INBOUND	
Driver:	Condition: LOADED	Lot:	
Driver ID:	Status: OK	Spot:	
Driver Cert:	Tare Weight: .0000	Order No:	
Carrier:	Gross Weight: .0000	Delivery No:	
Truck ID:	Net Weight: .0000	Comments: None	
Chassis/Trailer: 323	Container ID: T-323	Commodity: 10143273	Arrival: 06/10/19 00:00
Type: CHASSIS	Container Type: ISO TANK	Yard: OUT OF SPEC	
Driver:	Condition: LOADED	Lot:	
Driver ID:	Status: OK	Spot:	
Driver Cert:	Tare Weight: .0000	Order No:	
Carrier:	Gross Weight: .0000	Delivery No:	
Truck ID:	Net Weight: .0000	Comments: None	

170 Container(s) ready for Check-Out

▶ Users select between the different tabs from the Check-Out dropdown.

Check Out: Container

- Container
- Trailer
- Truck

▶ To Check-Out, start selecting a Truck from the Truck ID dropdown and clicking on the Check Out button (highlighted in Red).

Check Out

Comments

Seals

Get Weights

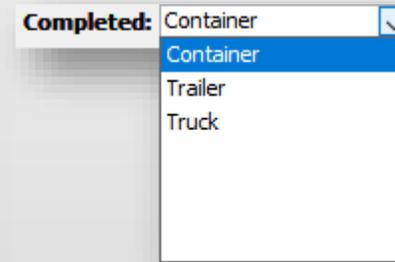
# In-plant - Completed Truck/Trailer/Container

- ▶ These tabs allows users to check-in either a Truck, a Truck and Trailer or a Truck, Trailer and a Container.

Chassis/Trailer:	Container ID:	Ship From:	To:	Filter
Chassis/Trailer: D31904 Type: UNKNOWN Driver: Driver ID: Driver Cert : Check Out User: Ship Date: 10/25/2019 15:15:52	Container ID D425048 Type: ISO TANK Condition: LOADED Status: OK Yard: Spot: Lot:	Delivery No.: Order No.: Commodity: Shipping Carrier: Approver: Comments: Comments Exist	04/03/19 13:17	11/23/20 13:17
Chassis/Trailer: T910061 Type: UNKNOWN Driver: Driver ID: Driver Cert : Check Out User: Ship Date: 10/25/2019 15:15:16	Container ID E5210301 Type: ISO TANK Condition: LOADED Status: OK Yard: Spot: Lot:	Delivery No.: Order No.: Commodity: 1233ZD HI-BOILER MATERIAL Shipping Carrier: Approver: Comments: Comments Exist		
Chassis/Trailer: T910064 Type: UNKNOWN Driver: Driver ID: Driver Cert : Check Out User: Ship Date: 10/11/2019 12:26:23	Container ID E5210301 Type: ISO TANK Condition: LOADED Status: OK Yard: Spot: Lot:	Delivery No.: Order No.: Commodity: 1233ZD HI-BOILER MATERIAL Shipping Carrier: Approver: Comments: Comments Exist		
Chassis/Trailer: T403408 Type: UNKNOWN Driver: Driver ID: Driver Cert : Check Out User: Ship Date: 10/4/2019 12:40:28	Container ID E5210148 Type: ISO TANK Condition: LOADED Status: OK Yard: Spot: Lot:	Delivery No.: Order No.: Commodity: 1233ZD HI-BOILER MATERIAL Shipping Carrier: Approver: Comments: Comments Exist		

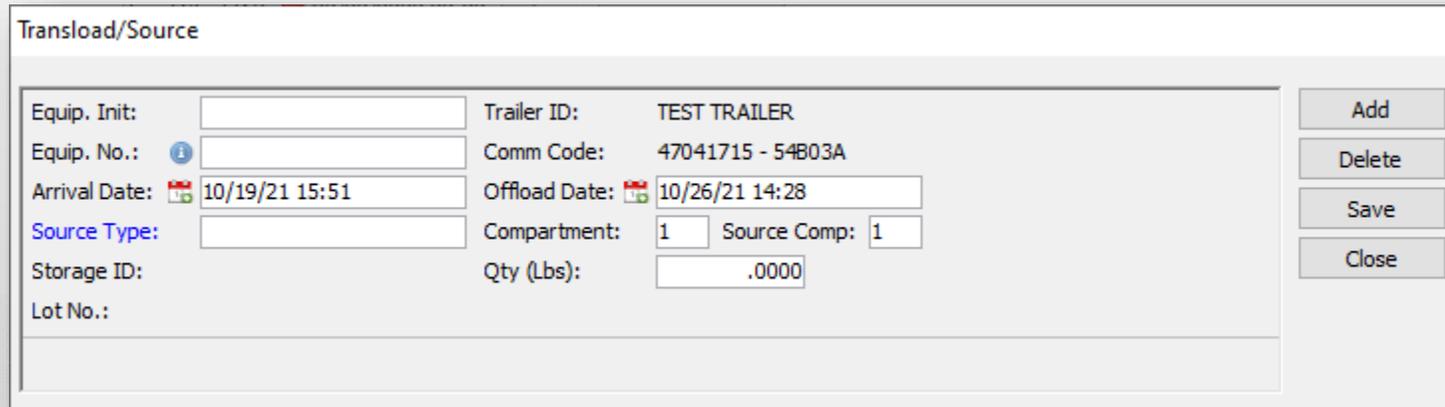
624 Completed Container Record(s)

▶ Users select between the different tabs from the Completed dropdown.



# Transloading

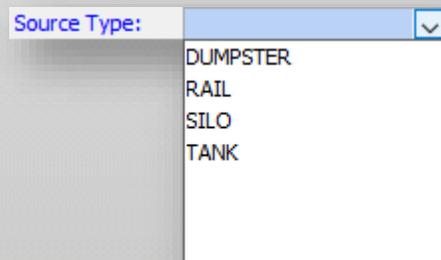
- ▶ This window allows the user signify what Transload source the loaded quantity came from.



The screenshot shows a software window titled "Transload/Source". It contains several input fields and buttons. The fields are arranged in a grid-like fashion. On the right side of the window, there are four buttons: "Add", "Delete", "Save", and "Close".

Equip. Init:	<input type="text"/>	Trailer ID:	TEST TRAILER	<input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Close"/>
Equip. No.:	<input type="text"/>	Comm Code:	47041715 - 54B03A	
Arrival Date:	<input type="text" value="10/19/21 15:51"/>	Offload Date:	<input type="text" value="10/26/21 14:28"/>	
Source Type:	<input type="text"/>	Compartment:	<input type="text" value="1"/> Source Comp: <input type="text" value="1"/>	
Storage ID:	<input type="text"/>	Qty (Lbs):	<input type="text" value=".0000"/>	
Lot No.:	<input type="text"/>			

- ▶ Users select between the Source Types from the dropdown.

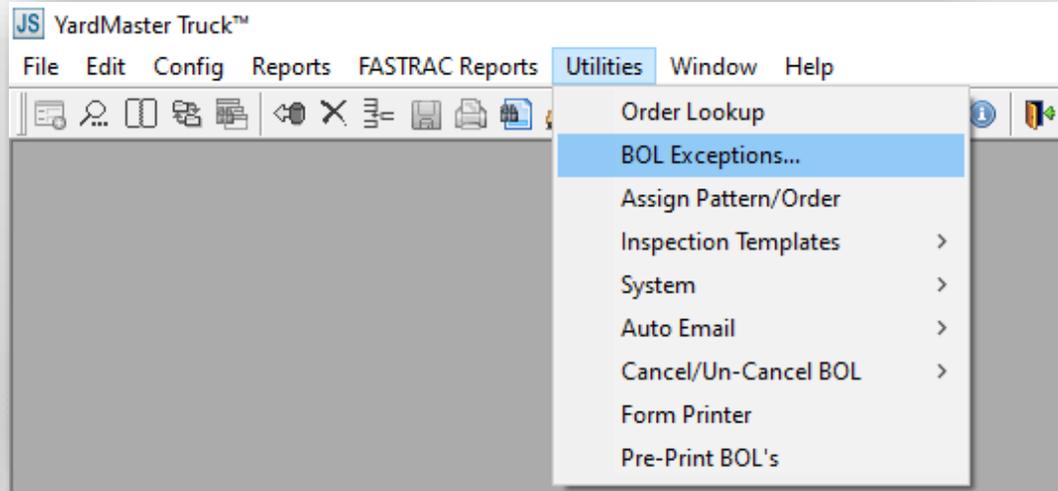


The screenshot shows a dropdown menu for "Source Type". The menu is open, displaying a list of options: DUMPSTER, RAIL, SILO, and TANK.

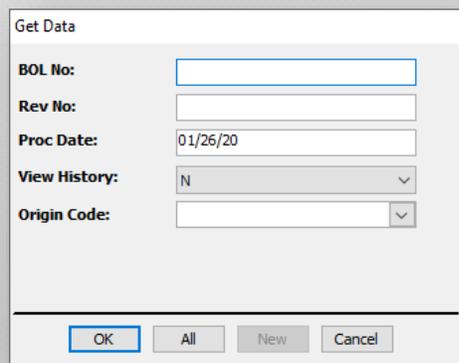
Source Type:	<input type="text"/>
	DUMPSTER
	RAIL
	SILO
	TANK

# BOL Exceptions

- ▶ Users can navigate to the BOL Exceptions screen via Utilities - BOL Exceptions



- ▶ From there, users can search in Get Data for specific BOLs or click on ALL to view all BOLs that were processed with exceptions.

A screenshot of the 'Get Data' dialog box. It contains the following fields: 'BOL No:' with an empty text box; 'Rev No:' with an empty text box; 'Proc Date:' with the value '01/26/20'; 'View History:' with a dropdown menu showing 'N'; and 'Origin Code:' with a dropdown menu. At the bottom, there are four buttons: 'OK', 'All', 'New', and 'Cancel'.

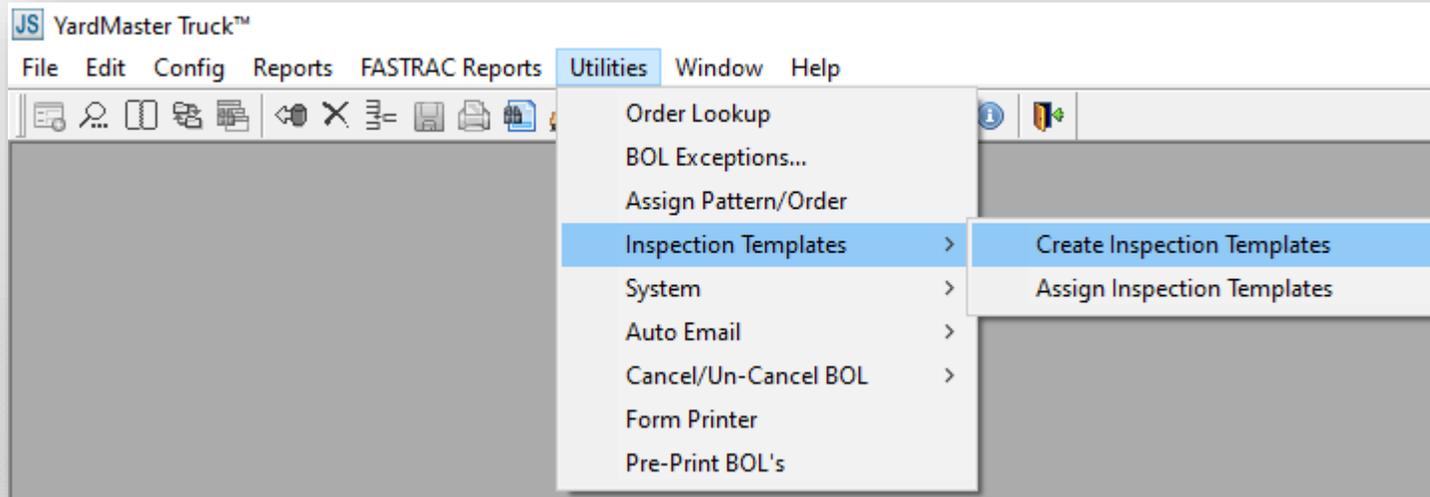
# BOL Exceptions

- ▶ The search results below, show a variety of different reasons why a BOL was processed with errors.

Origin	BOL No.	Rev No.	Proc Date Time	Error No.
	564363	0	01/02/08 10:32	1
<b>Msg:</b> No commodity hazmat identification could be determined				
	106014	0	07/02/07 17:00	1
<b>Msg:</b> No commodity name could be determined				
	106015	0	07/02/07 17:00	1
<b>Msg:</b> No commodity name could be determined				
	106016	0	07/02/07 17:00	1
<b>Msg:</b> No commodity name could be determined				
	106017	0	07/02/07 17:00	1
<b>Msg:</b> No commodity name could be determined				
	106018	0	07/02/07 17:00	1
<b>Msg:</b> No commodity name could be determined				
	106019	0	07/02/07 17:00	1
<b>Msg:</b> No commodity name could be determined				
	1121251	0	07/10/08 14:01	1
<b>Msg:</b> Destination details could not be determined				
	1121251	2	07/11/08 13:01	1
<b>Msg:</b> Destination details could not be determined				
	1121251	3	07/11/08 18:01	1
<b>Msg:</b> Destination details could not be determined				
	1121252	0	07/14/08 16:02	1
<b>Msg:</b> Destination details could not be determined				
	1130271	0	07/14/08 16:02	1
<b>Msg:</b> Destination details could not be determined				
	1166251	0	07/25/08 08:01	1

# Inspections - Creation

- ▶ Users can navigate to the Inspections screen via Utilities - Inspection Templates - Create Inspection Templates



- ▶ From there, users can search in Get Data for specific Inspection Templates or click on New to create a new inspection template.

A screenshot of the 'Get Data' dialog box. It has three input fields: 'Template Code:' with a dropdown arrow, 'Inspection Type:', and 'Template Dscr:'. At the bottom, there are four buttons: 'OK', 'All', 'New', and 'Cancel'.

# Inspections - Creation

- ▶ Clicking on NEW will bring up a list of fields for the user to fill out:

Add Inspection Template

Template Code	Inspect Type	Template Description	Inspection Sequence	Inspection Point	Inspection Load
	<input type="text"/> HOPPER TRUCK TANK TRUCK	<input type="text"/>	<input type="text"/> 1 2 3 4 5 6 7 8	<input type="text"/> ARRIVED CHECK-IN COMPLETED LOAD PARKED	<input type="text"/> PRE-LOAD POST-LOAD

- ▶ Select your new template and click on the Inspection Line Items button to add section items to your template.

JS Maintain Inspection Template

Sort By Column: Inspection Type (Asc), Template Code (Asc)

Find Column: [ ] Where: [=] Value: [ ] And/Or: [And]

Template Code	Inspect Type	Template Description	Inspection Point	Inspection Load	Inspection Sequence
GEIS	HOPPER TRUCK	GEISMER PRELOAD	ARRIVED	PRE-LOAD	1
POSLOADCO	HOPPER TRUCK	TEST INSPECTION FOR POSTLOAD CHECK OUT	CHECK-IN	PRE-LOAD	1
PRELOADCI	HOPPER TRUCK	TEST INSPECTION FOR PRELOAD CHECK-IN	LOAD	POST-LOAD	1
PERNCONI	TANK TRUCK	PERN CONTAINER INSPECTION	CHECK-IN	PRE-LOAD	1

# Inspections - Creation

- ▶ Click on New to bring up the window to add an Inspection Line Item

Template Code	Inspection Description	Portable Inspection Description	Sort Order	Result Type	Action Result

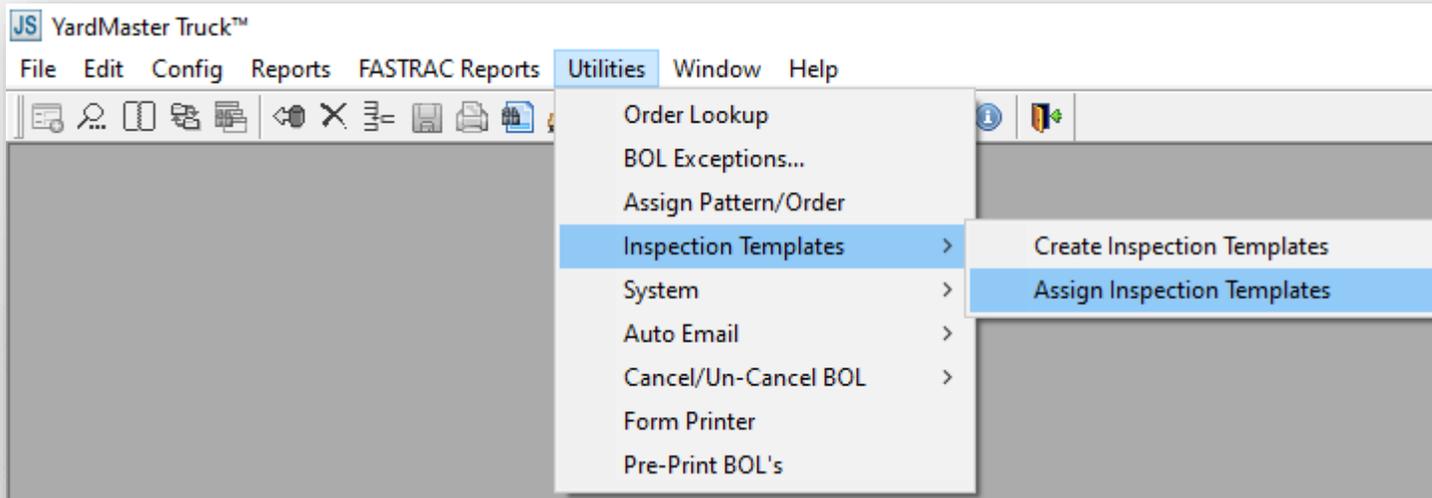
Add Cancel

- ▶ Below is an example of a Preload Inspection for Trailers:

Template Code	Inspection Description	Portable Inspection Dscr	Sort Order	Result Type	Action Result
GEIS	PRELOAD INSPECTION: CHECK-IN - TRAILER		1	H	
GEIS	Please advise the condition of the Trailer		2	G	GOOD
GEIS	Is the Trailer interior Clean and Dry?		3	Y	YES
GEIS	Please provide the date of when the Trailer was last cleaned.		4	X	
GEIS	If any, please note any defects or issues with Trailer.		5	X	
GEIS	PRELOAD INSPECTION: CHECK-IN - DRIVER		6	H	
GEIS	Is the driver in good standing? Fail if driver has 3 infractions.		7	P	PASS
GEIS	ADDITIONAL COMMENTS:		8	X	

# Inspections - Auto Assign

- ▶ Users can navigate to the Inspections screen via Utilities - Inspection Templates - Assign Inspection Templates



- ▶ From there, users can search in Get Data for specific Inspection Templates or click on New to create a new inspection template.

A screenshot of the 'Get Data' dialog box. It contains several search criteria fields, each with a dropdown arrow: Plant ID, Template Code, Equipment Type, Commodity, Carrier, Truck ID, Trailer ID, Dest. State, and Customer. At the bottom of the dialog, there are four buttons: 'OK', 'All', 'New', and 'Cancel'.

# Inspections - Auto Assign

- ▶ Click on New to bring up the window to add an Inspection Line Item

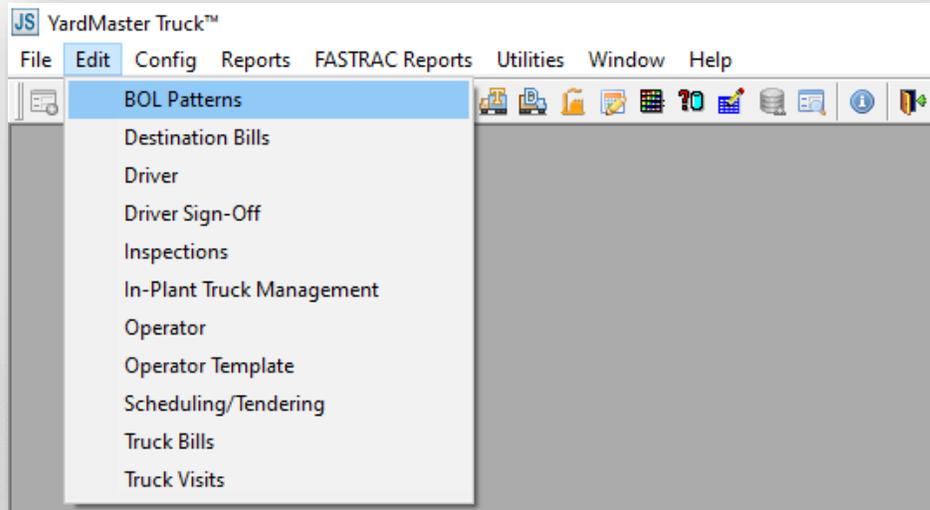
A screenshot of a dialog box titled 'Add Inspection Assignment'. The dialog contains several input fields: 'Plant ID' (a dropdown menu with 'HOU-HOUSTON, TX' selected), 'Template Code', 'Equip Type', 'Commodity', 'Carrier', 'Truck ID', 'Trailer ID', 'Dest. State', 'Customer', 'User ID', and 'Proc Date'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- ▶ In the below selected example, the Preload inspection will only auto-assign to a BOL if the Equipment Type is selected as an ISO CONTAINER, the carrier is TRANSWOOD and the customer for the BOL is DOW CHEMICAL USA.

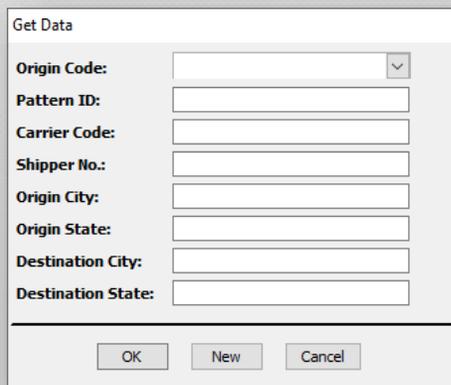
Plant ID	Inspect Template Code	Equipment Type	Commodity	Carrier	Truck ID	Trailer ID	Dest State	Customer
HOU	TEST INSPECTION FOR POSTLOAD CHECK	ISO CONTAINER	ALL	ALL	ALL	ALL	ALL	ALL
HOU	TEST INSPECTION FOR PRELOAD CHECK-II	ISO CONTAINER	ALL	TRANSWOOD	ALL	ALL	ALL	DOW CHEMICAL USA

# BOL Patterns - Creating a Template

- ▶ Users can navigate to the BOL Patterns screen via Edit - BOL Patterns



- ▶ From there, users can search in Get Data for specific Templates or click on New to create a new template.

A screenshot of the 'Get Data' dialog box. It contains several input fields: Origin Code (a dropdown menu), Pattern ID, Carrier Code, Shipper No., Origin City, Origin State, Destination City, and Destination State. At the bottom, there are three buttons: OK, New, and Cancel.

# BOL Patterns - Creating a Template

- ▶ Only the sections highlighted in **Blue** are required.
- ▶ There are additional tabs, such as Destination Details, to add additional details

Maintain Patterns

Header Info | Destination Details | Additional Addresses | Ref No/ Spec Handling/ Ship Instr | Canadian HAZMAT

Origin Code:  Section 7:   
Pattern ID:  Loaded/Empty:   
PMT Code:  Carrier Code:   
BOL Type:  Equipment Type:   
Process in TP?:  User ID:   
FOB:   
Commodity:

**Shipper**

Shipper No.:  Address:   
Shipper Name:   
Shipper Name2:   
Contact:  City:   
Phone:  ST/ZIP:   
Fax:

- ▶ Click on the save icon to save your new template:



# BOL Patterns - Creating a BOL

- ▶ To create a BOL, go back to the list screen of Patterns, select a pattern you want to use to create a BOL and click on the Create Dest BOL's button:

Origin Code	Pattern ID	Carrier Code	Shipper No.	Customer No.	Comm Code	Origin City	Origin State	Dest City	Dest State
TEST	TEST	TEST			TEST				

- ▶ The next window will ask additional details about the BOL. Click on Generate List to get a final list of the BOL(s) you want to create and click on Create BOLs to auto-generate BOLs based on the set criteria.

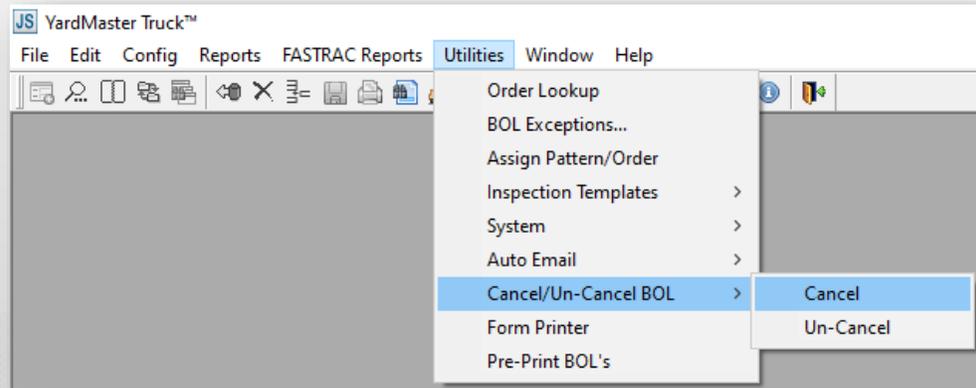
Origin Code	Pattern ID	Carrier Code	Shipper No.	Customer No.	Commodity	Origin City	Origin State	Dest City	Dest State
TEST	TEST	TEST			TEST				

Number of BOL's to: 1 Requested Delivery Date for: 01/27/20 15:28 Quantity: 10.0000 UOM: LB

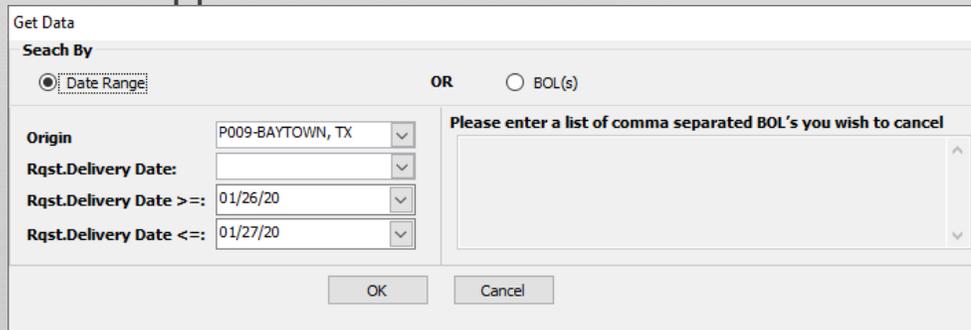
No.	BOL	Requested Delivery Date	Quantity	UOM
1		01/27/20 15:28	10.0000	POUNDS

# Cancelling BOLs

- ▶ Users can navigate to the Cancel BOLs screen via Utilities - Cancel/Un-Cancel BOL - Cancel

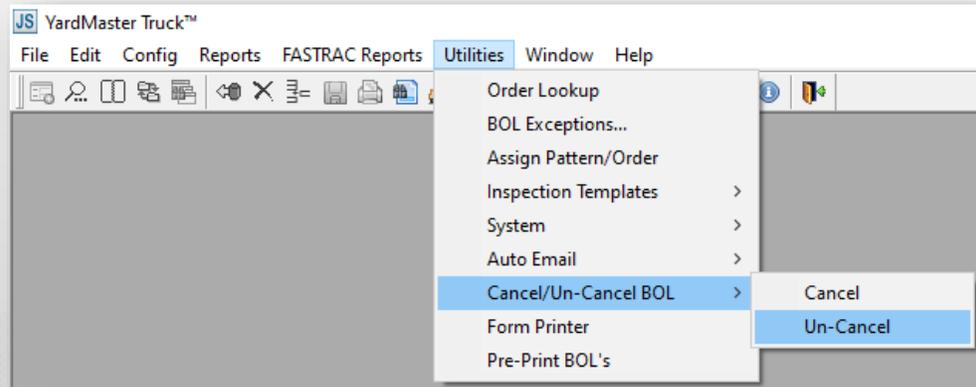


- ▶ From there a user can either search in Get Datafor BOLs to cancel based on Delivery Date range or provide a list of BOLs.
  - ▶ Please note only BOLs in a READY status can be cancelled - BOLs that have already been shipped cannot be cancelled.

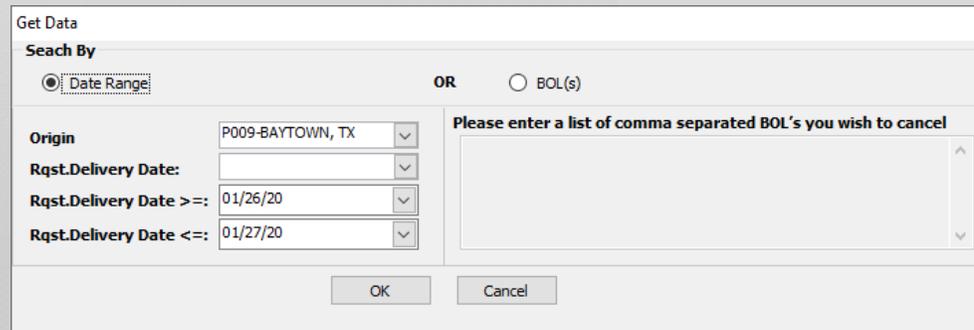
A screenshot of the 'Get Data' dialog box. It has a 'Search By' section with two radio buttons: 'Date Range' (selected) and 'BOL(s)'. Below this, there are four dropdown menus for search criteria: 'Origin' (P009-BAYTOWN, TX), 'Rqst.Delivery Date', 'Rqst.Delivery Date >=:' (01/26/20), and 'Rqst.Delivery Date <=:' (01/27/20). To the right of these is a text area with the prompt 'Please enter a list of comma separated BOL's you wish to cancel'. At the bottom are 'OK' and 'Cancel' buttons.

# Un-Cancelling BOLs

- ▶ Users can navigate to the Un-Cancel BOLs screen via Utilities - Cancel/Un-Cancel BOL - Un-Cancel



- ▶ From there a user can either search in Get Data for BOLs to un-cancel based on Delivery Date range or provide a list of BOLs.
  - ▶ Please note only BOLs in a CANCELLED status can be un-cancelled.

A screenshot of the 'Get Data' dialog box. It has a 'Search By' section with two radio buttons: 'Date Range' (selected) and 'BOL(s)'. Below this, there are fields for 'Origin' (P009-BAYTOWN, TX), 'Rqst.Delivery Date', 'Rqst.Delivery Date >=:' (01/26/20), and 'Rqst.Delivery Date <=:' (01/27/20). To the right, there is a text area with the prompt 'Please enter a list of comma separated BOL's you wish to cancel'. At the bottom, there are 'OK' and 'Cancel' buttons.