

Auftragsverwaltung

Basics

Which functions does the order management provide?

The order management is to assign and administrate orders, sent to the different vehicles. Therefore you need the correct hardware in your cars, supporting the order management functions. Additionally the ordermanagement has to be activated on the website. An order created at the website will be send to the car display. The driver then can accept or reject the order. This and the following actions will be stored and visible at the order management site. Depending on the used hardware the available functionality may differ.

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Available lists





After starting order management there will be visible the actual orders by default. Other order states and functions will be available by switching the tabs. The upper tab bar offers the following options:



- active orders
- delayed orders
- not received orders
- orders per car
- order pool
- closed orders
- search
- dispo overview
- settings

The tabs

Common list structure




Above each list will be placed some buttons. The buttons to reload the current list and to create a new order will be available everywhere. Depending on the current order state an order can be additionally (re)send, cancelled, closed or deleted.

	<i>refresh</i>	Reloads the current list.
	<i>create new order</i>	Opens the window to create a new order
	<i>(re) send selected orders</i>	Sends the selected orders to car displays. If no car assigned to an order draft, there will be shown a list, to assign the cars.
	<i>revoke selected orders</i>	Sends a message to the car display to cancel the selected order. After display confirmed the cancellation the order will be marked as closed. If it is enabled in the settings that the driver must not confirm a order cancel, there will be only a information on the display of the order cancellation and the order is canceled immediately.

	<i>close selected orders</i>	Sends a message to the car display to cancel the selected order. Immediately sets the order as closed on the website. This may be helpful if the car display is unreachable, to set the order as closed nevertheless.
	<i>delete selected orders</i>	Attention, this deletes the order with the according state entries from the website permanently

Depending on your setup the list contains a number of entries per page. The count of entries can be changed temporary directly at the table head or permanently by changing personal settings. Additionally there will be a search field on the upper right to filter the orders by the columns: order number, car, order state and customer. An ascending or descending ordering per column is also available.

The following columns are available:

<i>order created on</i>	date and time when an order was created
<i>order number</i>	selfdefined order number
<i>car</i>	the car, received the order
<i>order state</i>	last state message send by car (this column is not available for order pool)
<i>customer</i>	A self defined customer name, for the order. This name can be a customer from address book or a new identity.
<i>planned arrival time</i>	It's possible to set an estimated arrival time directly on order creation. If defined such a time, it will be shown in this column. Only orders with a planned arrival time can ever be sorted into delayed orders list.
<i>Action</i>	<ul style="list-style-type: none">  Shows the order details with according state history.  Only for order pool available. Allows edit of current order.  Creates a copy of the selected order with all settings of the current order as predefined values. This makes it easy to create multiple similar orders.

Available lists

<i>active orders</i>	Actual orders are orders, sent to a car and progress is not completed, canceled or revoked. Such an order can't be deleted directly but can be canceled or closed. After an order was cancelled a message will be send to the car display to remove the order. After the car display confirmed the deletion, the order will be moved to closed orders. Besides the details you can create a copy of an order, too. The copy function will be available instead of edit, because an order, sent to a car can't be changed at display. Especially informing the driver would be a problem. So copy opens the order create window with preselected values from the source order. This new order can be send as is or with any changes.
<i>delayed orders</i>	A delayed order is an order, where an estimated arrival time is set and this time elapsed without order completion.
<i>not received orders</i>	An order is delivered, if the car display returns an acknowledgement message. Sent orders without such an acknowledgement message will be shown in this list. Some minutes of delay are completely normal. Older orders in this list may be the result of a communication problem to the car. In this case you should try to resend the order and/or inform the driver.

orders per car	This list shows all orders send to a car within the last 24h. For each of this orders the last state with according timestamp will be visible.
order pool	An order, not send to a car will be stored in the order pool. Such a draft can be edited or send. Besides such an order doesn't need a car assigned. So future orders can be entered in a block and assigned to a car, when they shall be send. Because such a draft was not send to a car, it can be deleted directly. Attention, a deletion is not reversible.
closed orders	Here are listed all closed orders, no matter how they were closed. This means here are not only successfully completed orders but also cancelled and declined orders. An order closed via the website will be marked with a hook (🔒). An closed order can be deleted too, because the order data are only available at the website. <div>Attention: Deleting an closed order will not only remove the order itself but also the according history entries permanently</div>
disposition overview	The dispo overview is another type of graphical presentation, showing the order execution.
search	The search allows to define filters upon all available order data. Compared to the regular search field it is possible to define what you want very precisely. (look at extra paragraph: the search)

For actual, delayed, not delivered orders and order pool there will be shown the count of enclosed orders in the tab list.

The search

On switch to search tab there will be only a limitation, of orders created in the last 30 days, active. To search for the filtered data there will be a *search* button between input area and result list. The following filters are available: *order create date*, *order state date*, *planned arrival time*, *order number*, *order text*, *car(s)*, *customer(s)*, *order state* and *user*

the first 3 parameters are time spans. You can select a predefined timespan from the list or you can define the date range yourself. If a date was set, the filter can be removed with the x (✖) behind each field.




All other input fields can handle multiple search terms for filtering. For cars the selection is similar to the create/edit dialog. In all other input fields the filter parameters will be shown as tokens. A token can be set by pressing enter. Each of this tokens can be deleted seperately. An order will be found, if one of the tokens for a filter will fit and all of the filters will fit.

Create/Copy/Edit order



After clicking *create new order* (📋+) the input mask will be opened. The input masks to edit or copy an order are the similar but with prepopulated data, so the following points apply to all cases.


customer name	For easier coordination and navigation a customer name can be assigned to an order. The suggestions referring to the data from the address book. So you can enter a name or just click on the address book symbol (👤) to open it and select the correct customer. If such a known customer is selected and an address is available, this address will be used automatically as navigation target. You can change the target manually later.
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<i>order number</i>	A self defined order number consisting of chars and numbers.
<i>navigati on target</i>	Using a garmin display in your cars, a navigation target is required for an order. For other displays the navigation target can be optionally set. You can just enter the target address and select from autosuggestion list or just confirm your input with enter key. The map symbol () will open an extra input mask, to enter the target as latitude/longitude too or use the map to specify it. This navigation target can be added to the order text, to be visible for the driver.
<i>car(s)</i>	An order can be send to one or multiple cars. If you just want to select one car, just select it from the list. To specify multiple cars or groups use the first option <i>select multiple cars</i> . This opens a dialog, where you can click, the desired cars. If a navigation target is set, you see the distance () each car has to the navigation target. Using the routing module will show you not only airline distance but also the routed distance and the estimated driving time.
<i>extende d options</i>	If not completely disabled you can (un)hide here the extended order options
<i>sort number</i>	To ease the drivers work, you can set a sort number, the driver will see on the display. This number will be added at the beginning of the order text.
<i>planned arrival time</i>	Furthermore it is possible to define a planned arrival time when a navigation target has to be reached and the order has to be closed. This order time can be added to the order text, so the driver can see it. To remove the date and time there is a red x on the right (). To use the planned arrival time you must specify date AND time field
<i>append form</i>	Using a CAMOS display or an android based device allows the usage of self defined forms. If such a form is stored at the current display already, this form can be directly appended to the order.
<i>notificati on</i>	Besides the order text itself a notification can be sent as sms or email. The according notification text has no dependency to the order text itself.
<i>order text</i>	The order text. The available length of order text may differ and depends on display type and availability of sort number, navigation target and planned arrival time. Thats why below the text field a line with the available chars is shown. Moreover there are checkboxes, if the navigation target, arrival time, a customer contact (1) or the arrival time shall be added to the order text and by how many chars the order text will be reduced then.
<i>cancel</i>	Cancels the input and return to the last overview list.
<i>send / create order / save changes</i>	Create or save an order just adds or modifies an order in order pool. Using the sending function sends an order to the selected objects, too and so moves the order to the sent orders. To allow faster creation of multiple orders each option exists with the extension "+ create more" to not open the overview list at the end but opens a new input mask.

(1) As customer contact will be used the first contact entry for the selected customer. To use this function, an existing customer has to be selected by *customer name* and for this customer at least one contact has to be available.

Settings

Depending on used hardware and user rights the settings menu contains 2 to 5 sub tabs.

<i>personal settings</i>	always available with the following options: <ul style="list-style-type: none"> • set default table rows for order lists • on create or edit orders, reduce the count of available options for better overview (if options not or only rarely used) • Behaviour, if new customer name entered on create new order. Using the option <i>ask for changing address book</i> results in an extra input mask to completely fill the customer data, if a new customer name entered. • Set an alert tone, if new messages or orders received. Currently Firefox, Chrome, Safari, Opera and Internet Explorer 9+ are able play the sound. Besides the browser the computer also needs the hardware (sound card and speakers) to play a sound. If you are unsure, there is a play button () behind the select field. If you can hear the sound after clicking, your computer is able to play the notes
<i>order state settings</i>	With a CAMOS or android based display it is possible to define own order state messages. You can use up to 6 self defined state messages with 2 optional actions. It is possible to set an order as active or to delete it from the display. Other messages like an acknowledgement by driver or a pause state need no action. After order states changed, it is necessary to send the new configuration to your cars. We recommend to send it always to all cars to have the same data base.

<i>notification settings</i>	Besides the order itself a separate notification message can be sent via email or sms. Set the default behaviour here to always send such a message and what the default text shall be. Due to sms limitations the text always is limited to 120 chars.
<i>tab settings</i>	Here you can set which tabs are available on top and influence the sequence. The administrator can set a profile to be active for the whole company and additionally lock the change of this setting for regular users.
<i>orders/forms</i>	To get this menu at least one CAMOS display or android based device is required, too. This menu is to grant or refuse right to create an order directly at the display. Additionally a default form can be set to extend each of this self created orders.
<i>order text layout</i>	If you are using only Garmin FMI Displays you are able to define the which elements shall be part of order text and in which sequence this elements will be listed. Changing the configuration is equal to tab settings using drag & drop functionality. Additionally there is a preview to show an example text as it is visible at the car display.
<i>display configuration</i>	It is possible to configure the order administration of all displays of a company. So you can decide what happens if a order is canceled. Has the driver to confirm the cancellation of an order on the display or get's he only an information about it.