

# Client Order Details and Steps

## Accessing an Order

Order details can be accessed by clicking on the eye symbol action icon or by selecting the vehicle row in the search results list.



**ORDER LISTING (2/252)** Switch to escalation view  Export to CSV

Enter search text Status: Active Orders Query: None

Clear: All Filters

STATUS ID	ORDER DATE	REMAINING SLACK	SUPPLIER	PAYER	ORDER NUMBER	URL	PICKUP	DROPOFF	ESCALATION STATUS	HOLD REASON	HOLD RELEASE DATE	ACTIONS
	06/14/2022 10:03:01	N/A	Client Name Here	MIAHEM KANSAS CITY (4985047)	KCAA20032798	XXXXXXXXXXXXXXXXXX	Pickup Location Here	Manhattan Kansas 672 396 JN Skiles Ave 64543-9305		unresponsive location	7/5/2022	
	06/23/2022 13:04:07	2 days 11 hours 50 minutes due	Client Name Here	HAWKEM HAWKSPRINGBURG (4985043)	HMS20036719	XXXXXXXXXXXXXXXXXX	Pickup Location Here	Manhattan Kansas 672 396 JN Skiles Ave 64543-9305				

## Basic Navigation of an Order

Step 1-4 Tabs can be selected to move to the respective step details

Greyed out areas are filled in from order entry (API or manual) and can't be adjusted

Areas in white are open for manual updates, if needed

For notes desired enter information up to 240 characters and then use the 'Add New Note' button to save

Toggle options are available in various steps of the order. When green that means that the toggle option is yes and when greyed out will be no

**ORDER UPDATE**

Client Details Location Details Notes Vehicle Specs Discard Save

**Order Details**

Order Created: 06/14/2022 Order Number: KCAA20032798 Order Source: AS400 Escalation Ref: b1ef286-ebba-11ea-8a45-000000000000

Ready Business Segment: COMMERCIAL Ready Business Subsegment: COMMERCIAL Suspension Fee: 720.00 Manually Changed: No

Order Price: 0.00 CP Manually Changed: No Additional Order Price: 0.00 Total Order Price: 0.00

**Client Information**

Client Name: Client Name Here Company: XXXXXXXX Address: Address Details Here

City: City Here State: MI ZIP: 48108 Country: USA

**Payer Information**

Payer Name: Payer Name Here Payer ID: XXXXXXXX Address: Address Details Here

City: City Here State: MO ZIP: 64161 Country: USA

Enter new note Add New Note

**Hold Details**

Item Reference: Hold Reason: Unresponsive Location

On Hold:  Hold Type: REASON: unresponsive location Release Date: 07/05/2022

Hold by: ka.gibson@dhl.com

**Vehicle Condition**

Is the vehicle operable?

**Key Availability**

Are the keys to the vehicle available?

Number of keys available: 1

**Fees and Payment**

Are there any fees due at the time of origination?

**Document Requirements**

Upload

The following documents are required:

DOCUMENT NAME	DOCUMENT ID	ACTIONS	SP DOCUMENT	URL

The arrows can be used to move from one step to another

Use the three-dot icon for more details to manage order for:

- Escalations
- Cancellations

Use the Discard button to dispose of any changes made while in the order. The Save button will be available once on Step 4 and can be used to save order details adjusted

Dropdowns are used in several areas of the Order to make choices related to the vehicle and/or information for the transport

Upload option is available for the documents section to search local drive files and attach to the order. Some documents are auto-attached based on client requirements

## Step 1: Client Details

Step 1 Client Details include the basic order information from Order Entry including how the vehicle moved into the Order Management system and what business segment (Commercial or Dealer) it is classified in. Client and Payer information will display and can be adjusted on Step 1. If the Name and ID are updated the address information displayed will auto-update with the change.

## Step 2: Location Details

Step 2 Location Details has all the vehicle specific details decoded by the VIN including the vehicle size, Year, Make and Model. It also includes the specifics for pickup and drop off locations which dictates the distance of the transport3 in mileage.

## Step 3: Notes

Step 3 Notes houses the notes for the client, carrier and team members. It also is where holds are placed, released and where hold history is visible. The inventory type is a very important piece of the order and will show on this tab.

To add a note the user should type in the 'Enter New Note' section and select the Add New Note button. Below is what each note section is for:

<b>Order Notes</b>	Internal to team and client visible. Will auto-generate to AutoIMS if Order Management Portal is integrated for the client.
<b>Transport Order Notes</b>	Notes sent to the carrier post-dispatch acceptance. This would include any details for the pickup or drop off that the carrier may need. Ex. Contact name, number, account number to stock into
<b>Pre-Dispatch Notes</b>	Information needed for a carrier to decide if they should take or not take a consignment to move. Ex. Operability, specific pickup location or drop off location hour restrictions, lot restrictions

ORDER UPDATE

✓ Client Details

✓ Location Details

③ Notes

④ Vehicle Specs

Discard

Save

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→
⋮

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Pickup & Delivery

Scheduled Pick Up Date  
 06/29/2022

Scheduled Delivery Date  
 06/16/2022

SLA  
 3(B)

Pickup SLA

Inventory Type  
 Lease

Enclosed?

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Notes

Order Notes

Shelly Wilson | 06/15/22, 10:24 AM  
**UNIT IS READY FOR EXPEDITED PICKUP**  


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Kia Gibson | 07/01/22, 9:37 AM  
 Will contact agent during open business hours for verification of unit PU.

Enter new note

+ Add New Note

200 characters remaining

Transport Order Notes

System | 06/15/22, 10:24 AM  
 Check in under Ford. Must fill out attached FORD VCR with mileage documentation. No exceptions. Carrier must use eBOL. No DRP's paid. Call PU 24hr.

Enter new note

+ Add New Note

200 characters remaining

Pre Dispatch Notes

System | 06/15/22, 10:24 AM  
 Must fill out attached FORD VCR with mileage documentation. No exceptions. Carrier must use eBOL. No DRP's paid.

Enter new note

+ Add New Note

200 characters remaining

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Hold Details

Item Reference

On Hold

Hold Reason  
 Unresponsive Location

Hold Release Date  
 07/05/2022

HOLD TYPE	REASON	RELEASE DATE
kia.gibson@dhl.com	unresponsive location	07/05/2022

Inventory Types include:

- Arbitration
- Auction to Auction
- Auction to Service
- Auction to Store
- Company Vehicle
- Consumer
- Corporate Buy Back
- Deployment
- Element Core
- Element Surplus
- Element Trade-In
- Last Mile Delivery
- Lease
- Rail
- Recon
- Redeployment
- Reject
- Repo
- Service to Auction
- Store to Auction
- Store to Store
- Straight Buys
- Vroom Trade In

## Step 4: Vehicle Specs

Step 4 Vehicle Specs includes basic information needed for verification such as operability, keys and fee information. It also includes the documentation attachment section, which allows documents to be sent via the system to carriers in order to pickup the vehicles timely.

**ORDER UPDATE**

Client Details   Location Details   Notes   **Vehicle Specs**   Discard   Save   < > ⋮

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### Vehicle Condition

Is the vehicle operable?

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### Key Availability

Are the keys to the vehicle available?

Number of keys available\*

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### Fees and Payment

Are there any fees due at the time of origination?

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### Document Requirements

The following documents are required:

DOCUMENT NAME	DOCUMENT ID	ACTIONS	SP Documents	URL
ford vcr	21805722		<a href="#">Upload</a>	

SP Documents

SP DOCUMENT

Please add escalation details

Escalation Details   240 characters remaining