# Carrier Logistics Inc.

## FACTS™ Release Notes for Version 11.3

**February 2019**

FACTS™ 11.3 continues the tradition of added valuable enhancements to our Enterprise Software application. In this our latest release, there are over 150 enhancements covering 18 disciplines from shipment entry to accounts receivable. In addition, FACTS™ now has Excel-enabled the most commonly used reports for download to make the reporting process easier and more user-specific.

FACTS™11.3 supports Windows 10,8,7 and Red Hat LINUX versions 5,6,7 (FACTS™ Database Server or Application Server). The minimum Windows Desktop resolution supported in FACTS™11.3 is 1280 by 768. Larger Desktop resolutions are recommended.

We hope you find these enhancements of value. Once you have identified areas of particular interest, please contact us to set up an online training session to review the specifics.

Please note that while all of the enhancements listed here are generic, some may not be compatible with your existing FACTS™ implementation and may require additional effort to have them function as designed.

Also, on pages 17 and 18, be sure to review the complete list of Display Fields now available to report on using Multi-Trace.

If you have any questions regarding any of the features listed in this document, please contact our help desk at [helpdesk@carrierlogistics.com](mailto:helpdesk@carrierlogistics.com).

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## Accounts Receivable

- Added "Company," "Origin," and "Destination" filters to the "Short and Overpayments" report.

- Added "Currency" along with the ability to filter by "Currency Type" to the "A/R Aging" report.

- Under "Customer Payments Entry" added the ability to identify and change the "Currency Type" for a payment (when entering check number and amount for a customer). The applicable exchange rate from the "Currency Exchange Rate" table (for the date of payment) will be retrieved and entered into the memo field.

- Enhanced the "IAP Writeoff File Maintenance" screen and all associate logic/programs to use a new write-off type: "IAPWOF."

## Appointments

- For users booking appointments, Saturday and Sunday are now included on the "Appointment Scheduling" screen.

- Added "Door," "Appointment," and "Release" numbers to the "Appointment Scheduling" screen so users can an enter more information about the appointment.

- When booking an appointment, if the customer is unavailable, the user now has the option to apply a result code under the "Reason for Delay" field. The same Information is available on the History tab of the "Shipment Details" Screen for that appointment.

- Added several fields to the "Set Appointments" screen for users to filter on specific information, such as "Consignee," "Service," "Terminal," and "PO#."

- Added a field for "Fax Number" to the "Appointment Scheduling" screen.

- When a user accesses customer information on the "Appointment Scheduling" screen, there is now a field to display the "Customer Code or Number." If the customer has no code, the display will read "MANUAL."

- Enhanced appointment functionality to show the "Appointment Contact" instead of the A/R Profile Contact when accessing Customer Information.

- Users have the ability to add and/or modify a contact for new appointment and existing appointment customers in the "Appointment Scheduling Screen."

- Added a field to the "Operations Customer File" to indicate when a customer has preapproved the pre-booking of appointments.

- Added "Requested Arrival Date (RAD)" to the "Set Appointments" screen, "Service/Performance by Day" report, "P&D Planning" screen, and "Multi-Trace."

## Call Logging & Dispatch

- On the "P&D Planning" screen, added an option to print a "Route Sheet Summary" from a user-defined printer.

- Added a check box to the "Dispatch Routes (from Planning)" screen, which when selected will automatically print a route sheet summary and delivery receipts. This option is only for routes requiring paperwork.

- In "Dispatch by Driver," added the option to exclude deliveries from the "Print Pickup and Delivery Manifest." This is useful for pickup routes that have no mobile communication.

- Added logic to recognize that, when there are deliveries going to the same consignee, a Stop Manifest is printed rather than individual delivery receipts. The same logic will ensure that, when there is a single delivery going to a location, only a delivery receipt gets printed.

- Added logic to "Dispatch Routes from Planning" to print a stop manifest instead of DRs when stops are grouped together.

- Further enhanced the system recognize the days the customer is closed (from the Operations Customer File) and display this information in a new column labeled "Closed" on the "P&D Planning" screen.

- Added an appointment flag to daily pickups on "Pickup/Delivery Info" and "Daily Pick P/U" tabs so that appointment pickups can easily be reported on.

- To further assist dispatchers, FACTS™ now displays a soft error on the "Pickup Call Logging" screen when the "Ready Time" is greater than the predetermined "Pickup Window Time."

- Added a new column to the "P&D Planning" screen (upper browser) with the logic to display the "Chassis Unit Number" tied to the "Container Number" displayed in the "Trailer" field.

- Also added, on the "P&D Planning" screen (upper browser), a column called "Route Note" with a "Y/N" option to indicate when there is a "Route Note" so a route planner can easily identify them.

- On the "Route File" Screen, added a field for a route's temperature. Dispatchers can select a temperature code from the pre-defined temperature ranges existing in FACTS™ today. The "Temperature" displays in a new column on the upper browser of the "P&D Planning" screen, as well as the "Dispatch by Driver" screen.

- Added an option to print a "Cash Collect Summary" only for routes that have cash collect shipments.

- Updated the "P&D Planning Screen" with a new column to identify the original route a delivery was assigned to by the "Grid File." The original route remains regardless where a shipment is moved to via an override or manually.

- For routes using mobile devices, when a driver updates statuses such as "Enroute," "Arrived," and "Departed" on the device, the same statuses appear in a new column labeled "Status" on the "Dispatch Screen."

- Added driver names as shown on the "Dispatch by Driver" screen to the "Close Time Inquiry" screen against each stop on the route.

- Added the ability to "Move," "Move & Dispatch," "Dispatch," or "Undispatch" stops in "Close Time Inquiry."

- Applied the same logic used on the "Dispatch by Driver" screen to "Section Lookup," so dispatchers can change the section for a route using a search feature.

- On "Dispatch by Driver – Terminal View," changed the logic of "Start Time" to use the time the first route was dispatched and not the start time of any additional routes the driver was assigned during the day.

- Enhanced "Dispatch by Driver – Terminal View" to highlight "Admin" routes differently than the "P&D" routes.

- On the "Dispatch by Driver – Terminal View" screen, "Close Time Inquiry" now shows all the columns that are on the lower browser of the "Dispatch by Driver" screen.

- Changed the auto-refresh rate to one minute on the "Close Time Inquiry" screen and added a "Refresh" option to the right-click menu.

- Added a right-click option to access the "Operations Customer File" from the lower browser of the "Terminal View" screen.

- The "Dispatch by Driver" screen (Stop Level) now displays the "Attributes" column from the "Pickup Call Logging" screen.

- In the lower browser of the "Dispatch by Driver – Terminal View," users can now click and drag stops within a route to re-sequence it. Also added a "Save" button to commit any changes and a "Cancel" button to undo them.

- On the "Pickup Call Logging" screen, when multiple line items contain the "HAZ" accessorial, the "Haz Mat Types" column now only displays "HAZMAT" once.

- In "Call Logging," added terminal (TERM) codes in the "Shipper" search browser so that when a user selects a customer, they can now view "Terminals," "Virtual Terminals," and "Drop Yards" as listed in the "Terminal File."

- When logging a pickup that includes a driver "Other" activity, dispatchers can now update additional fields including "Chassis" and "Trailer" numbers, "Temperature," "Load Status," and "Stop Note."

- On the "Call Logging" and "Stop Inquiry & Changes" screens, added a new field to enter "Trailer Footage" in free-form text.

- When a user enters a line item in "Call Logging" with the "HAZ" accessorial, there is now an option to enter "Class" along with notes in free-form text.

- Added new status codes to the "L: Loaded" column in "P&D Planning" to indicate when the pieces of shipment being scanned are either partially or fully loaded.

- Added a right-click option to "P&D Planning" to look up the "Consignee" in the "Operations Customer File."

- Made an enhancement to show the most current status of partial or completed shipments that are being planned, being loaded, or loaded in the existing "Status" column on the "P&D Planning" screen.

- Added an option to "Route Balancing and Sequencing" to print multiple delivery manifests and associated delivery receipts in a batch.

- Added "Terminal" reference and the "PO Number" fields on the "P&D Planning Screen."

- Added a field to the "Driver Check-in Log (History)" to allow for the manual entry of minutes of "P&D" work a driver has performed. The information is displayed on the "Route Summary History" report as "P&D Hours."

- Added an option to the "Load Shipments for Delivery Planning" screen for users to request shipments dating back from 15 days to 30 days.

- Added logic to send "Requested Arrival Date" (RAD) notifications to the subscribed consignee, shipper, and bill-to contacts when:
  - the RAD date is earlier than the original transit Due Date
  - the RAD date is earlier than the Appointment Date.

- When updating a shipment in the "P.O.P. Updates" screen, users now have the option to "Drop a Trailer," which will automatically detach the trailer from the route.

- Added a new function called "Carrier Cutoff" to set up, add, edit, or modify details on a Carrier. It displays the "SCAC" code, "Carrier" code, "Carrier Cut Off," and "Community."

- Added three new columns to the route level of "Terminal View": "Last Stop Planned ETA," "Mobile Phone Number," and "Chassis Number."

- When dispatching a route from the right-click menu in "P&D Planning," we added an alert/indicator to let users know if the route operates with a mobile device.

- Added logic to "P&D Planning" to automatically move shipments into a Route when P&D shipments are dropped in a drop yard by a P&D Driver.

- On the "PreBook Appointment Scheduling" screen, added a " Send" option that opens the "Print/Email PreAppointment Details" window so the user can send pre-booked appointment details to a customer before finalizing the appointment.

- Added a new field labelled "Trailer Location" to the lower browser in "P&D Planning." This field is populated with the current terminal from the "Equipment File" of the unit number being

displayed in the "Strip Unit" field.

- On the "P&D Dispatch" screen, added two options to:
  - o Include or exclude routes from the "Daily Reset"
  - o Reset one or more routes manually.

- Enhanced the system to allow users to enter multiple PO/Ref numbers to the pickup stop in "Call Logging." Added the same functionality to the "Other Driver Activity" option.

## Claims

Made major enhancements to our Claims module:

### Event entry –

- o Added the terminal to the shipment record.
- o Added Destination C/L and Destination C/L Reference Number from "Pro – auto populate."
- o Users can copy the piece count, weight, pallet count, pallet spaces, and description from the "Details" lines from the shipment record.
- o Added an "Involved" field opposite each detail line to indicate if the items on the individual line are included in the event.
- o Added an "Event" claim code opposite each detail line.
- o Added a field to allow the user to specify the delivery status. Options are "Delivered," "Refused," "Destroyed," "Return," and "Blank" (used only when the event is "Shortage").
- o Added fields to indicate if the shipment was "Accepted" or "Refused" at delivery.
- o Added a free-form notes field that copies to the OS&D Notes on the "Claim Notes' tab.

### Claim Entry /Update -

- o Modified Claim Entry to allow the entry of a claim without the prerequisite of a "Claim Event" being created first.
- o Added the "Pro Number" field to the "Claim Entry/Update" screen, including the "Terminal" (TRN) to allow the claim to be submitted against the shipment by terminal number.
- o Added a "Tracing" button to the "Claim Entry/Update" screen.
- o Enhanced the "Claimant" screen to permit the entry of two address lines to match the Billing (A/R) Customer File format.
- o Contact information will now populate automatically with type of contact from the "Contact" tab of the Billing (A/R) Customer File.
- o Expanded the width of the "Reason for Claim" field.
- o Allow for the copying of details related to the physical description of the goods involved from the shipment, including "Pieces," "Weight," "Pallets," "Pallet Spots," and "Description."
- o Created 3 new fields:
  - a. Approved Amount
  - b. Approved Date
  - c. Approved By

o "Currency Type" has been added to the "Claim Amount," "Resp Amount," and "Resp Check" fields on the "Claim Entry" screen under the "Claim Entry Update" tab. This value is determined from the "Bill To (Debtor) Customer" for the applicable shipment number.

## Responsibility Tab –

o Added editable fields to the "Responsible Party" screen, including the full name and address of the responsible party. If the responsible party is a "Driver," "Other," "Unknown," etc., the user needs to manually enter the name and address.
o If the responsible party is a carrier or contractor (Orig, Dest, LH or Contractor in lookup), the system will populate the "Responsible Party" field with contact information from the "Carrier/Agent File."
o Made a change to only enable the "Carrier Code" field if the responsible party is a "Carrier" or "Contractor" from Carrier/Agent File.
o Created the option to select if any notes are to be included on the "Carrier Liability" letter.
o A new type of note, called "Responsibility Notes," was added to the "Claim Notes" tab for notes specifically related to a settlement.
o The "Carrier Liability" and "Carrier Claim Aging" letters are now addressed to the name and address of the responsible party and not the interchange point address in the "Carrier/Agent File."
o Added a "Resolution Section" where the following statuses are now available:

  o Transmitted
  o Declined
  o Paid in full
  o Compromised
  o Pending

o The "Resolution Section" also includes:
  o Last Update
  o Settlement Date
  o Settlement Amount
  o Settlement Method
  o Settlement Notes

## Additional Modifications to Shipment Detail History

o In Multi-Trace, whenever an event is created or a claim is entered in Claim Entry, the event gets recorded in "Admin history." The "Event" will show the "Claim Code" and "Claim Number."
o Added functionality so that when a user selects an event, the "Claim Entry" screen opens the "Event Entry" screen for that shipment.
o Added functionality so tjat when a user selects a claim record, the "Claim Entry" screen opens the "Claim Entry" screen for that shipment.

## Customer Files

- Renamed the "Sales Origin" field in the "Billing (AR) Customer File" to "Delivery Terminal Override." Users can enter the "Delivery Terminal" so the "Sales Origin by Division" value can be applied to the delivery. This is useful when you need to override the Division (i.e., Company) for different terminals or in situations where separate transport and courier terminals operate in the same city.

- Added the ability to set customer invoicing preferences to the "Billing (AR) Customer File." When a user opens the file and enters the customer "Account #" and goes to the "Invoice Preferences" tab, the preferences can be set up for Inbound and Outbound freight types. This feature is controlled by a system control switch.

- In addition to the existing "PU Freight Ranking" field in the "Operations Customer File," CLI added a "Delivery Freight Ranking" field which when used, assists dispatchers in knowing the level of difficulty to expect when a driver is making a delivery to a specific customer. Both the "PU" and "DEL" rankings can also be used for productivity reports.

- In the "Operations Customer File," added an option to print singular delivery receipts for that customer when dispatching from "PD Planning."

- Check boxes have been added to the "Operations Customer File" file to indicate which day(s) the business is closed. The information is displayed in the "Open/Closed" times section in "P&D Planning."

- Added a "Pickup Window" field (in hours) to the "Points List" and "Operations Customer File" so a dispatcher can apply a specific pickup time for a shipper instead of relying on the default Zip/Postal Code pickup window.

- Dispatchers can now view a stop's restricted hours on the "Dispatch by Driver" screen if a route has these hours indicated in their "Operations Customer File."

- A "Customer Contact for Waiting Time" pre-notification field was added to the "Billing (A/R) Customer File." Once set up, a customer will be notified about waiting time charges when applied to their deliveries.

- Added logic to the "Billing (A/R) Customer File to control the use and hierarchy of rating when using a shipment's dimensional weight by Company & Service.

- Extended the length of the "Driver Note" to 200 characters to allow for free-form text on the "Customer Info" tab of the "Operations Customer File."

- Added a lookup feature to the "Acct Type" field on the "Customer Info" tab of the "Operations Customer File."

- If a customer's profile in the "Operations Customer File" has "Equipment Requirements" listed, the same requirements are now shown on the "Pickup Call Logging" screen. By using the new search feature, which opens the "Equipment Requirements" browse window, any information entered by clicking the binoculars overrides the default information. The same information will also show on the "Dispatch by Driver" screen.

- If a user has entered a fax number on the "Billing (A/R) Customer File" "Information" tab and checks "Ops Create Ops Profile," the fax number populates the "Customer Operations File."

- In order to create a daily pickup for a stop that does not have an associated shipment, CLI added new fields to the Operations Customer File": "Trailer," "Type," and "Load Status."

- Added a checkbox for "Requested Arrival Date" (RAD) to the "Billing (A/R) Customer" file to flag a customer for RAD on shipments based upon "Company Code" and "Service Type." When checked, the system will validate the "Billing (A/R) Customer File" for the existence of a RAD record and automatically open the "Appointment Scheduling" screen.

- Added the ability to assign an alias address under the "Billing (A/R) Customer File" ("Alias Names" tab) so users can search by either an alias name or address.

- On the "P&D Planning " screen, users can now display and assign "Pre-Book Appointments." Once updated, the system will create a stop record and load it into P&D planning for the correct terminal.

- When the user is entering information for a particular customer on the "Pickup/Delivery Info" tab in the "Operations Customer File," they now have the option to indicate whether the shipment is to be "NOSE" or "TAIL" loaded. If nose-loaded, the stop appears before other stops in the lower browser of the P&D Planning screen. If tail-loaded, the stop appears at the bottom of the list.

- Modified the "Pallets Required" field in the "Billing (A/R) Customer File" ("Invoicing Details" tab) to include "Pallets Required by Company Code/Division," which will automatically update Shipment Entry and Quote Entry.

- Enhanced the "Billing (A/R) Customer File" to be able to add multiple account numbers to establish a relationship to the Master account number. This supports the reporting on multiple accounts that are linked together.

## Dock

- Enhanced Dock Management System (DMS) to display the associated temperature code for every pin/unique barcode on a dock handheld device.

- Added a system control switch to disable the system prompt on a handheld for a forklift.

- Enhanced the "Dock On-Hand" report to show the number of pallets and the temperature of the pallets being scanned.

- Expanded the staging area field from 4 to 10 characters in the "Receive Freight" function.

- Added a column to show the "Shipment Date" on the "Individual Scan Details" report (Excel output).

- Added a button to the "Dock Worker Assignments" screen to view an image of the manifest. It is only enabled if the work assignment has a corresponding manifest number.

- Made it easier to create a dock assignment from "Prepare Manifest" screen.

## EDI

- Currently FACTS™ allows EDI 204's to be updated on the "Dispatch Board" when the status is "Arrived at Pickup." CLI made an enhancement where if the shipment status is already "Picked Up," the system will not accept any changes to EDI 204 fields on the "Dispatch Board."

- Created the ability to automatically accept all available EDI 210 files, validate all entries, and create vouchers for records that meet specified criteria. Any records that do not meet the criteria will be displayed on "Create IAP & Voucher from EDI File" screen with the reason why they were rejected. Along with having the ability to manually run this job, a CRON job was created to run at a specified interval.

- Added a system control switch that, when set to "true," will defer transmitting any images (on a partner level) until the EDI210 invoice is ready to be sent. Previously, FACTS™ transmitted images as soon as they were on file.

- Added a button to the "EDI Data Review" screen called "View EDI 210 Details," which, when selected, accesses the "Shipment Details" screen to allow users to analyze rejected files more easily.

- Added logic to allow a user to adjust an invoice from the "EDI Data Review" screen and restrict users from paying an amount different than the balance amount. This enhancement adds logic to have all shipments that have been previously rejected and subsequently updated by "Adjustments to Posted Shipments" to be validated against the write-off tolerances and other validation criteria when the CRON job or menu option is selected to load/process available cash application files.

o Added a feature to send an email to a carrier explaining why an invoice is being rejected or paid short. The user will have free-form ability to update the content of the email and, when it is sent, the system adds the note on the "EDI/Notification Tab" in "Shipment Details."

o Enhanced EDI triggering logic to an outbound 214 by origin or destination carrier.

o Created a "View EDI Holding Files" option to view any inbound 214 that is in hold status so users can resolve any matching issues. Users can filter on "Partner," "Type," and "Date Range." In addition, users can click on any row on the report and view the "raw EDI" which is being stored in the holding table.

o Added several fields, including "Division," to the "EDI204 Accept/Decline Load Tenders" utility. Upon acceptance, the user can modify the "Division," which in turn will automatically modify the "Service Type."

o In a situation where a revised 204 is received against a shipment that has already been input, the system will auto-accept the 204, return a 990, and discard the 204.

o Added logic to auto-accept EDI 204's based on Company (division).

o By enhancing the 204 tender "Accept/Decline" screen to include a drop-down of the decline reasons, FACTS™ now maintains the reason for declining an EDI 204.

o Provided the same functionality available in "Multi-Trace" to the "Accept/Decline" screen, where users can right-click and, from a drop-down menu, can customize or move columns, save, or reset settings.

o Modified the outbound 214 to include the reason for the delay of a late delivery or appointment so the information is visible to customers.

## Fuel Surcharge (FSC)

• For revenue purposes, "FSC" (Fuel Surcharge) can now be reported separately, as a new "FSC" field was added to the "Shipment" table. This stores the FSC (Fuel Surcharge) amount, but removes FSC calculations from the "Shipment Accessorial" fields (acc-prepaid and acc-collect).

• Added functionality for users to update the "Weight Based FSC" tab on the "Customer Keyword Exceptions" screen as a percentage of the Pallet/Piece break.

• Enhanced the "Fuel Exempt Maintenance" screen to write any addition, deletion, or modification to the "Rate Log Entry" file under "Pricing Profile."

# General Ledger

- To eliminate the possibility of transactions being processed in the wrong period, CLI added an "Active User Inquiry" button to the "G/L Month-End Closing Tools" screen so select user(s) are able to query FACTS™ to determine the users who are logged into a period that is to be closed. Through a notification, these users will have five minutes to log off or be forcibly be logged out.

- Added the ability to directly load an "EDI Cash Transfer" file, which, after loading, can be used to validate and confirm that the loaded records do not contain errors before updating applicable accounts.

- Under "Shipment Details," added a G/L code field to "Posted IAP Details" that is tied to the IAP (Interline Accounts Payable) table so that users can ensure that expenses are getting sent to the proper G/L.

# Invoicing

- Added logic to generate different invoices based on inbound or outbound freight.

- Enhanced "Company Code" logic to permit users to select multiple company codes for posting.

- Added the "Currency Type" to invoices and the "Invoice/Statement" XML file based on the billed currency.

- Added logic to both calculate and display the storage charge details on the applicable shipment and invoice.

- Added origin and destination "Connecting Line" numbers (C/L #) to the "Extra Charge Notification" report.

- Added new date fields ("Post Date" and "Stmt/Inv Date") to both the "A/R" tab and to the "Statement Summary" Report

# Linehaul

- Added an option to create a PDF of the "Rate Contract" in Linehaul Dispatch.

- Added a new button for a user to manually create a "Check Call."

# Quoting

- Added the "Currency Type" to the "Quote Entry" screen along with the ability to email a copy of the quote.

# Rating

- Created new exchange rate tables to allow the set-up of both standard exchange rates and customer specific exchange rates between USD and CDN or CDN to USD (with effective dates).

- Added the ability to rate a shipment based on the "Rate Currency and Billing Currency" setup and to bill accessorials in the currency of the bill-to account.

- Added filters to sort on multiple "Company Codes," "Entry Date," and "Weight Types" to the "Rate Audit Report."

- Created a new "Customer Reweigh Tolerance Exceptions" screen under "Pricing Profile," where a new attribute, "Reweigh Except," which when set up, ensures all shipments for that customer will get rated on actual weight only. The logic can also be applied at the Company (division) level.

- Added logic to the rating engine to display permanent default tolerance reweigh values for different Companies (divisions) within your organization.

- Enhanced storage rating logic to accommodate customer-specific rates by "Day," "CWT," "Pallet," and "Heated Service" with minimum and maximum tolerances.

- Amended the "Customer Rate Exception" screen by adding a "Service Type" field that automatically updates the "Customer Billing and Pricing Profile" under the "Rate Exceptions" tab.

- Enhanced consolidations to allow a user to consolidate shipments without concern for shipper, consignee or debtor with other shipments on the list. Users can also select a shipment that was found in the search and remove it from the list.

- Changed the rating engine to apply rating on the basis of pallet spots and not just on pallet count.

- Modified the "Excess Weight/Maximum Density" tab in "Rate Maintenance" to support calculating rates when the "Pallet Spot Weight" exceeds a specified maximum weight per pallet.

- Added filters to "Manual Consolidation" to display consolidated shipments by "Company" (division) and "Pro Date Range."

# Reports

- Added new fields to the "Service Performance Report (detailed view): "Shipper," "Consignee," "City," and "St/Prov."

- Added the ability to either select or add the SCAC code from the "List of Destination Carriers" field on the "Service Performance Report." Also added a field labeled "Carrier at Fault," which will populate when the carrier is known.

- Changed the "Export Customer Index" function to write the output to a user's local PC.

- Added the "Estimated Arrival Date and Time" from the Linehaul Dispatch screen to the "Daily Load Summary" report.

## Result Codes

- Added a checkbox to the "Result Codes" screen to flag for a storage delay, which, when selected, triggers the "Storage Charge" process.

- Added the ability to set up "Result Codes by Division" (Company) in the "Result Codes" screen.

- Added a new field, "Allowable Delay Days," to the Result Codes screen. Once the number of delay days is indicated, the system displays the result on the "Proof of Delivery/Status Update," "Delivery Updates," "P.O.D. Updates," and "Shipment Details" screens.

- Added logic to recalculate the "Due Date" and "ETA Date" based on the number of days the shipment was delayed when applying the "Excused Delay" Result Code. Also added logic to recalculate the "ETA Date" when an inexcusable result code is applied to a shipment.

## Shipment Entry

- In "Shipment Entry" for revenue-only bills, when the "Revenue Only" keyword is added to a shipment, the suffix field auto-populates with type "RO."

- Added a new contact type to the available list on the "Shipment Entry" screen called "STR" (Storage Pre-Alert) so customers can be notified about potential storage charges for a shipment.

- In "Shipment Entry," when a shipment has multiple POs and a user wants to book an appointment for a customer, all POs related to that shipment are now displayed in the existing "PO#" field.

- Created a "Geographical Surcharge" table that utilizes origin and destination pairings to generate a keyword that automatically populates a shipment in Shipment Entry. The resulting keyword will be utilized to assess charges on the shipment.

- If a cube is required for a customer, a soft error will now display in "Shipper Entry" that prompts the user whether a shipment should be entered without a Shipper/BOL cube. This allows the user to either update the bill with the Shipper/BOL cube or complete it without entering the Shipper/BOL cube.

## Tracing

- Tracing now displays the "Bill-To" customers' Invoicing Currency.

## Web

- Added the "Pallet Count" to the "Automated Delivery Alert" that goes out via email when set up in a customer's web profile.

- So that quotes can only be seen by authenticated users, CLI added security to exclude quotes when searching for a bill of lading number when the user is not logged in.

# Multi-Trace Dynamic Reporting

Added 50 new Available Display Fields to the Multi-Trace Report. Here is our current list:

| Fields | Description |
|---|---|
| Acc-Collect | Accessorial Collect |
|  | Prepaid Amt |
| ActDays | Actual Days |
| ApptEndDate | Appt End Date |
| ApptEndTime | Appt End Time |
| ApptNotes1 | Appt NOTE-I |
| ApptNotes2 | Appt NOTE-II |
| ApptStartDate | Appt Start Date |
| ApptStartTime | Appt Start Time |
| ar-amt | Ar Amount |
| ar-balance | Customer Balance |
| ar-entity | AR Entity |
| Balance-amt | Pro Balance Amount |
| BatchRegNum | Batch Register # |
| bill-add | Bill to Address |
| BilledWgt | Billed Wgt |
| Biller | Biller |
| bill-no | Bill-No |
| Bill-to | Bill To Name |
| billtocity | Bill to City |
| billtostate | Bill to State |
| billtozip | Bill to Zip |
| BkAPUTime | Actual PU Time |
| BkOnTime | PU On Time |
| BKSDelDate | Sched Del Date |
| BkSDelTime | Sched Del Time |
| BkSPUDate | Sched PU Date |
| BkSPUTime | Sched PU Time |
| BOLWgt | BOL Wgt |
| car-code | Carrier Code |
| carr-pct | Carr Pct |
| Carr-rev | Carr Rev |
| chDeliveryTime | Delivery Time |
| Class | Class |
| cl-date | Cl-date |
| cl-no | L/H Carrier Ref # |

| | |
|---|---|
| cl-payable | CL Payable |
| Co-add | Co ADD |
| Co-city | Cons City |
| co-code | Co-Code |
| COD-Amt | Cod Amt |
| cod-fee | Cod Fee |
| con-email | Consignee Email |
| cons-cust | Cons Cust |
| Consignee | Consignee |
| Co-St | Cons State |
| Co-Zip | Consignee Zip/PC |
| credit-limit | Customer Credit Limit |
| cust-ref | Customer Reference |
| Decl-val | Declared Value |
| DelArrTime | Del Arr Time |
| DelRoute | Delivery Route |
| dest-air | Dest Air |
| dest-cl | Dest C/l |
| dest-cl# | Dest C/L# |
| dest-pct | Dest Pct |
| dest-rev | Dest Rev |
| Dest-term | Dest Term |
| DimWgt | Dim Wgt |
| Discount | Discount |
| driv-remarks | Driver Remarks |
| dtDeliveryDate | Delivery Date |
| due-date | Due-Date |
| EDDDate | EDD Date |
| Email | Contact E-mail |
| Freight | Freight Charges |
| fsc-amt | FSC Amt |
| FSCCharges | Interline FSC Chgs |
| FuelPct | FSC Pct |
| GrossRev | Gross Revenue |
| group-no | Batch Reg # |
| gst-amt | GST Amt |
| JobNo | Job# |
| LastProNote | Pro Note (most recent) |

| | | | | |
|---|---|---|---|---|
| LDDDate | LDD Date | | PUDepTime | Pickup Dep Time |
| LHArrDate | Line Haul Arrival Date | | PUTrailer | PU Trailer |
| LHArrTime | Line Haul Arrival Time | | quote | Quote # |
| LHCharges | Interline Freight Chgs | | radDate | RAD Date |
| LnDimWgt | Interline Dim Weight | | rate-cust | Rate Cust# |
| manf-num | Manifest# | | rate-method | RTC |
| MasterJobNo | Master Job# | | RefNo | Appt Reference |
| MasterPro | Master Shipment | | ResultCode | Explanation |
| mileage | Mileage | | Revenue | Revenue |
| name | Contact Name | | rt-as-class | BOL Class |
| OnTime | On Time | | ScanDimWgt | ScanDim Wgt |
| orig-air | Org Air | | scanWgt | Scanned Wgt |
| orig-cl | Orig C/l | | ship-cust | Ship Cust |
| orig-cl# | Origin C/L# | | Shipper | Shipper |
| orig-pct | Orig Pct | | shiptelephone | Shipper Telephone # |
| orig-rev | Orig Rev | | Shpadd | Ship Addr |
| Orig-term | Origin Term | | ShpCity | Ship City |
| OthAcCharges | Other Accessorals | | shpemail | Shipper Email |
| OthAmount | All Accessorials | | shpemail | Ship State |
| Pallets | Pallets | | ShpZip | Ship Postcode |
| phone | Contact Phone | | slsmn-code | Slsmn Code |
| pod-date | Pod-Date | | srvtyp | Service Type |
| pod-driver | POD Driver | | srvtypdesc | Service Level |
| pod-rcvd | Pod-Name | | StatementNum | Statement # |
| pod-rem | POD Remarks | | stats-cust | Stats Cust |
| Pod-stat | POD Stat | | TaxAmount | Taxes |
| pod-time | Pod-time | | Telephone | Cons Telephone |
| pop-date | POP Date | | Terr-Code | Territory Code |
| pop-driver | POP Driver | | Tot-Chg | Total Chrg |
| pop-stat | POP Status | | tot-chrg | L/H Carrier Tot Chrg |
| pop-time | POP Time | | tot-pcs | Pieces |
| PostDate | Post Date | | tot-wgt | Weight |
| posted | Posted | | Trailer | DEL Trailer |
| PostStatus | Post Hold | | TransitDays | Transit Days |
| prepaid | Prepaid | | trip-no | Trip# |
| Pro-Date | Pro Date | | trkstat | Tracking Status |
| pro-pal.pallets | Pallets | | trn | TRN |
| pro-po.po-num | Flight# | | Typhl | TH |
| PUArrTime | Pickup Arr Time | | uld-no | Container# |
| puCall | P/U Call # | | | |