

Creating Job Booking Templates


Job booking can be made much quicker by the use of the Default Templates facility. You can use these templates to preset the values on the booking forms for the following fields : **Account ID, Job Type, Pieces, Weight, Notes, Dimensions, Service, Tariff Code** and **Goods Description**.

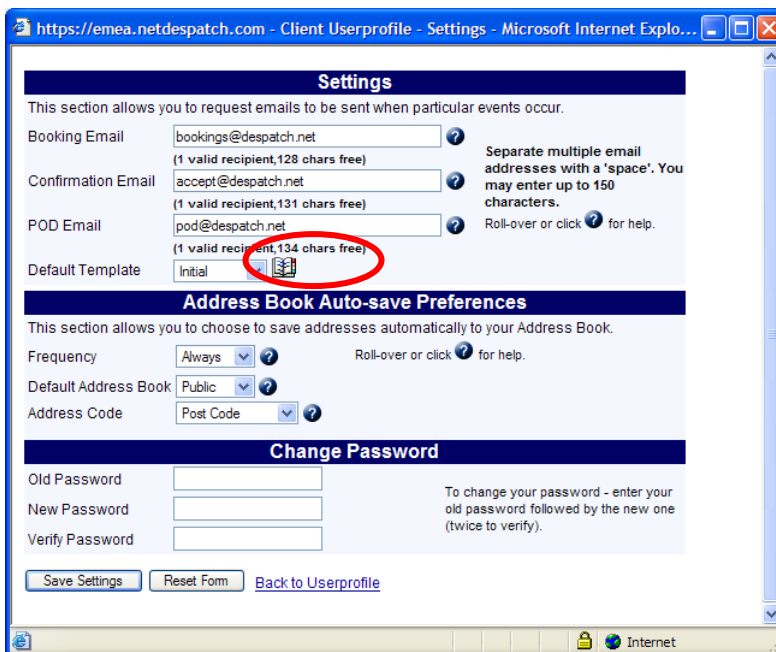
When your account is first set up by your logistics provider, it has an 'Initial Order Template', where these fields can be preset by the system administrator.

But you can set up further templates; for instance, one for each type of service – sameday, overnight or international, one for each of your departments, or even one for each product you sell.

By selecting the 'Template' from the drop-down list in the top right hand corner most of the fields on the job booking form can be pre-filled. Even if the fields are not visible on the form (such as the Notes field on the Quick Booking form) they will still be filled with the default data.

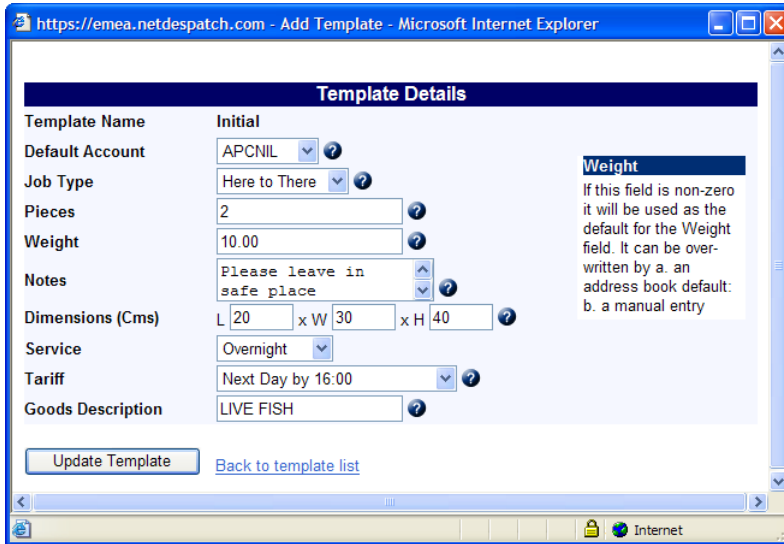
Instructions

1. Login to Velocity (using your **UserID** and **Password**).
2. Click **My Profile** in the top right-hand corner next to **Logout**.
3. Click the link **<Edit>** next to **Settings**.
4. Click on the  icon next to **Default Template**.




5. Click on the **Initial Template** to edit, or else **Add Template**.

6. You should now see the following Template entry screen



7. Choose the default settings you require for **Default Account**, **Job Type**, **Pieces**, **Weight**, **Notes**, **Dimensions**, **Service**, **Tariff** and **Goods Description**. Click  by any field if you need more information.

 If your job booking form has a dropdown list for **Goods Description**, then your default must match exactly (including case) one of the entries on that list.

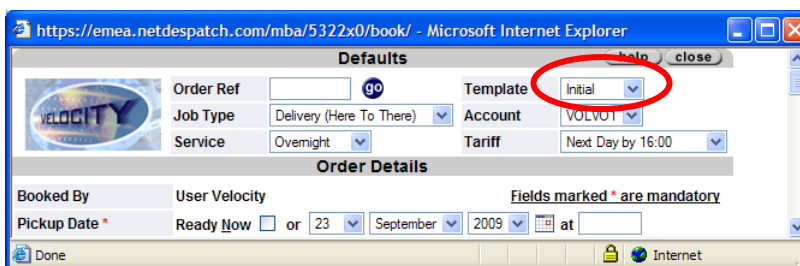
8. To save your template, Click on **Update Template**.


9. You can set up any number of **Default Templates**; and these will be visible to all of your Users.

Using your templates

10. When you load the booking form it will show the settings you have selected for the **Initial Template**.

11. Click on the **Template** drop-down to select from other templates you have created.



 Select your template first otherwise all the data you have entered will be over-written.

12. When you are entering data on the form, the template fields can be over-written by either selecting an entry from the **Address Book** or over-typing the contents.

If you have any questions or require any assistance regarding this information sheet please contact your logistics provider or email support@despatch.net