

TrackOnline

Instruction manual retailers

TRACK^oNLINE
developed by BEXTER

poolservice

Objective user manual

This instruction manual explains all steps required for a retailer to perform all actions expected with regard to CBL from Pool Service.

Steps in TrackOnline

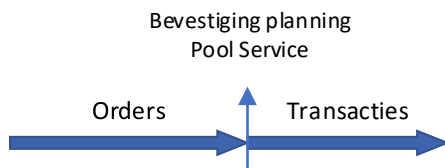
1. Login
2. Stock count
3. Transactions
 - a. Overview (incl. Depot plan)
 - b. Actions (confirm transactions)
 - c. Check status transaction
4. Orders

General information

An order can have 2 statuses in TrackOnline: Order and Transaction.

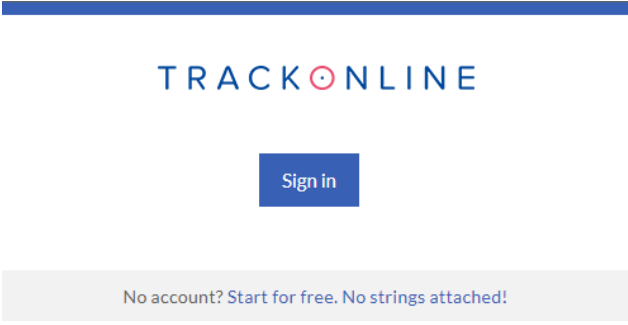
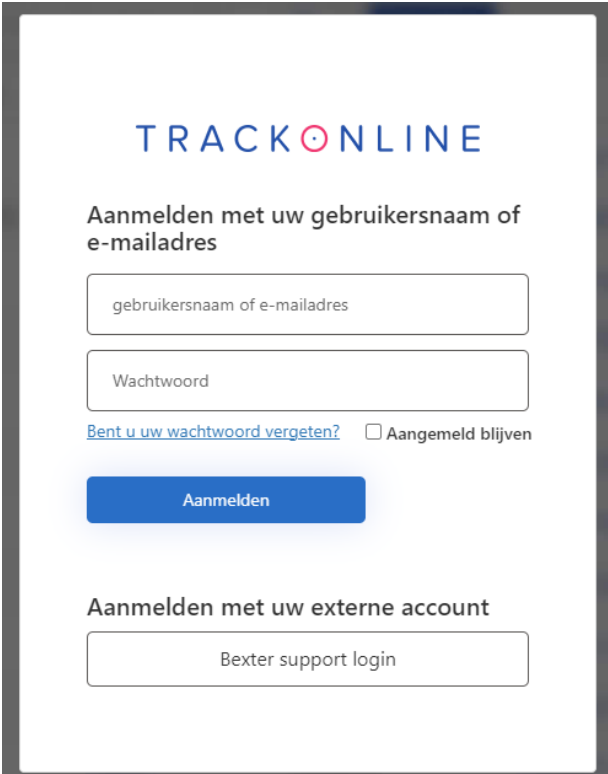
- ➔ Orders: All future orders that are not confirmed by Pool Service yet.
- ➔ Transactions: Orders become Transactions after they are confirmed by the planners of Pool Service.

Important: The order and transaction numbers are linked! The place where this can be found in TrackOnline will change.

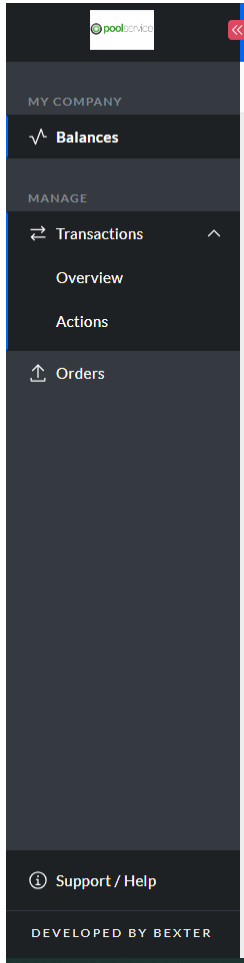


Next, all steps will be described separately.

1. Login

1	Go to: app.trackonline.com
2	Click Sign in 
3	Fill in your credentials. If you did not receive any login credentials, please contact Pool Service. If you forgot your password, please click "Forgot password?" 

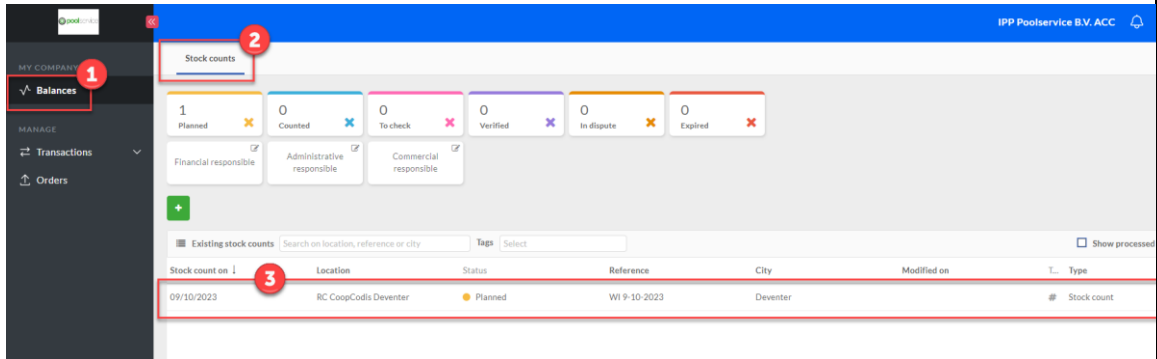
- 4 The left grey/black column is your navigator.
From here the relevant screen will open.



2. Stock count

1 Go to “Balances” (1) and “Stock Counts” (2).

Click on the line to open the planned stock count (3).



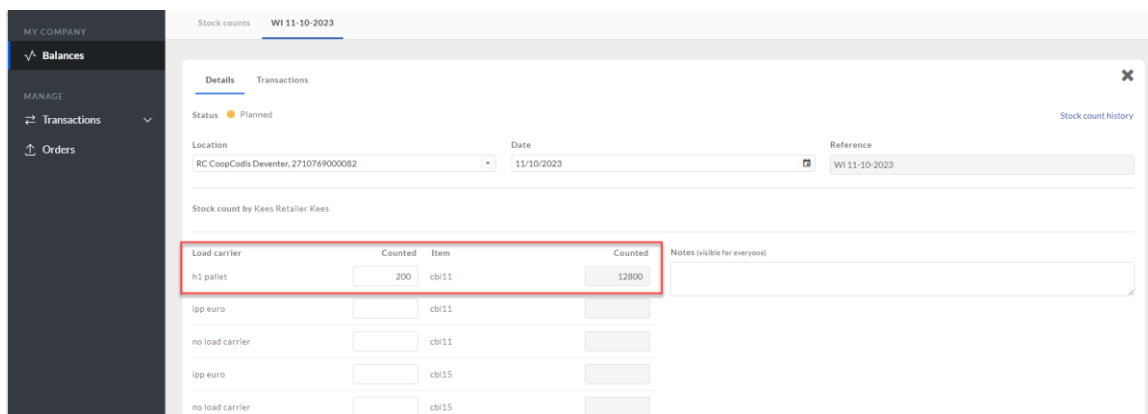
2 The screen for stock count entry opens. Fill in the amount of pallets.

Correct entry goes as follows:

- Enter the quantity of pallets for each type of pallet and CBL.
- The system calculates the amount of trays automatically based on the amount of pallets.
- A number must be entered in all lines.
- Fill in a zero when it is not applicable and when it is actually zero.

Currently we have the following inconvenience which will be improved in due course:

- In “No load carrier” “0” pieces must be entered. This line should not be visible but unfortunately, is.



3 When all values have been entered, press “Send”. The stock count has now been completed and submitted.

When you press “Save and close” the stock count will be saved, but not submitted. You can reopen this line, make adjustments and press “Send” later on (but no later than 8.00am!).

chep euro cbl8

no load carrier cbl8

Save and close **Send**

4 After submitting the stock count it will get status "counted".

Stock counts

1 Planned ✕ 0 Counted ✕ 0 To check ✕ 0 Verified ✕ 0 In dispute ✕ 0 Expired ✕

Financial responsible Administrative responsible Commercial responsible

Existing stock counts Search on location, reference or city Tags: Select Show processed stock counts

Stock count on ↓	Location	Status	Reference	City	Modified on	T...	Type
11/10/2023	RC CoopCodis Deventer	Planned	WI 11-10-2023	Deventer		#	Stock count
10/10/2023	RC CoopCodis Deventer	Processed	73682-2716532119072363	Deventer	10/10/2023, 07:06	#	Company stock count
09/10/2023	RC CoopCodis Deventer	Processed	73640-2716532119072315	Deventer	09/10/2023, 06:22	#	Company stock count

5 Contact Pool Service if you need to adjust and already submitted the stock count.

3. Transactions

A DEPOT PLAN

1 Go to Transactions -> Overview

Here you find all transactions, which are the confirmed Orders by Pool Service.

Type	Date	Status	From	To	Reference	Created on	cbi17	cbi7	cbi8	cbi11	cbi15
Transfer	11/10/2023, ...	Processed	Zijerveld & V...	RC CoopCod...		06/10/2023, ...	41	452	576		
Transfer	11/10/2023, ...	Processed	ProMessa B.V.	RC CoopCod...		06/10/2023, ...				1082	
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		1808	1688	471	1560
Transfer	11/10/2023, ...	Processed	Viverra B.V.	RC CoopCod...		06/10/2023, ...			424		
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		26	12	2	36
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		7	3		8
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		12	15		18
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		9	8	2	15
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		15	13	1	26
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		14	11		32
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		19	8	1	27
Transfer	11/10/2023, ...	Processed	W. Heemske...	RC CoopCod...		06/10/2023, ...		9	6	1	8
Transfer	11/10/2023, ...	Processed	Het Pluithuis	RC CoopCod...		06/10/2023, ...					320

2 This screen can be used to print or download tomorrow's depot plan.

1. Click "Orders future":
 - This leads to a filter set 7 days out.
2. Select the item configuration.
3. This creates a logic sequence of transactions.
4. Here you can select the dates.
5. By applying the right filter-set, planned orders for tomorrow will pop up.
6. This plan can be exported to Excel.

Type	Date	Status	From	To	Reference	Created on	cbi7	cbi8	cbi11	cbi15	cbi17
Hand out	11/10/2023, ...	Planned	RC CoopCod...	Wijchen_Wh...		10/10/2023, ...		4000			
Hand out	11/10/2023, ...	Planned	RC CoopCod...	W. Heemske...		10/10/2023, ...			2112		
Hand out	11/10/2023, ...	Planned	RC CoopCod...	W. Heemske...		10/10/2023, ...	5100			3168	
Hand out	11/10/2023, ...	Planned	RC CoopCod...	Vieems Comv...		10/10/2023, ...	3300				
Hand out	11/10/2023, ...	Planned	RC CoopCod...	ProMessa B.V.		10/10/2023, ...					738
Hand out	11/10/2023, ...	Planned	RC CoopCod...	WSP Food B.V.		10/10/2023, ...	6600				
Hand out	11/10/2023, ...	Planned	RC CoopCod...	Bakkerij Da...		10/10/2023, ...			1792		

3 Currently the Excel file contains too much information. Please delete the columns that you do not need. Then the file is ready for e.g. print out to be used by the warehouse.

Soon a format will become available like the format of the screen.

B ACTIONS OVERVIEW

1 In the action overview you find all open transactions.

1. You may enter an order number to look up orders easily.
2. You may select a CBL type for easy searching.
3. Open a transaction by clicking on it.

Type / Number	Reference	Document	Status	From	To	Action
Hand out #2710769000082A0080257	-	-	Planned	RC CoopCodis Deventer	Bakkerij Dam V.O.F.	Adjust or approve transaction.
Hand out #2710769000082A0080240	-	-	Planned	RC CoopCodis Deventer	WSP Food B.V.	Adjust or approve transaction.
Hand out #2710769000082A0080202	-	-	Planned	RC CoopCodis Deventer	ProMessa B.V.	Adjust or approve transaction.
Hand out #2710769000082A0080203	-	-	Planned	RC CoopCodis Deventer	Vieems Convenience Snacks BV	Adjust or approve transaction.
Hand out #2710769000082A0080180	-	-	Planned	RC CoopCodis Deventer	W. Heemsker B.V.	Adjust or approve transaction.
Hand out #2710769000082A0080181	-	-	Planned	RC CoopCodis Deventer	W. Heemsker B.V.	Adjust or approve transaction.
Hand out #2710769000082A0080182	-	-	Planned	RC CoopCodis Deventer	W. Heemsker B.V.	Adjust or approve transaction.
Hand out #2710769000082A0080105	-	-	Planned	RC CoopCodis Deventer	Wilchen_What's Cooking?	Adjust or approve transaction.

Later a date filter, a column with CBL type and a column with CBL quantity will be added.

2 Opening a transaction brings you to the following overview:

There are 2 options: Approve or Adjust.

1. Approve:

- Approve the transaction when no deviation exists between execution and order.
- Enter CMR number in "Document no." And click "approve".
- A reason code will be asked, here you select "Successful".

Hand out

From: RC CoopCodis Deventer To: Bakker| Dam V.O.F.

Carrier: (Optional) Select a carrier...

Date: 11/10/2023, 00:00 Date counterpart: 11/10/2023, 00:00

Document no. (Optional):

Number: 2710769000082A0080257

Reference: (Optional)

Notes: (Optional) Enter notes...

Order number: 2710769000082A0080257

Item definition	Quantity	Load carrier	Quantity
cb11 (Unknown)	1792	lpp euro	28

Select

Cancel Adjust Approve

2. Adjust:

- Use "Adjust" when the order is not executed according to plan.
- After clicking "Adjust" please select the appropriate reason code for the deviation, followed by "Save and Close".
- Enter document no. (CMR nr), notes, quantity CBL en pallets where a change is needed.
- After processing the changes click "Save and close".

Hand out

Change due to stock

From: RC CoopCodis Deventer To: Bakker| Dam V.O.F.

Carrier: (Optional) Select a carrier...

Date: 11/10/2023, 00:00 Date counterpart: 11/10/2023, 00:00

Document no. (Optional):

Number: 2710769000082A0080257

Reference: (Optional)

Notes: (Optional) Enter notes...

Order number: 2710769000082A0080257

Item definition	Quantity	Load carrier	Quantity
cb11 (Unknown)	1792	lpp euro	28

Select

Cancel adjusting Save and Close

C CHECK THE STATUS OF A TRANSACTION

1 After booking a Transaction, the status of the Transactions changes depending on who it has been booked.

Go to screen Transactions -> Overview

Click "Orders processed" (1) to select the orders of the past 30 days.

On the left in het filter screen (2) you may select an exact date.

Statuses (3):

All open transactions have status: "planned".

All approved transactions have status: "Processed"

All transactions with a deviation have status: "In dispute"

Orders with a deviation will be reviewed by Pool Service and in case of question Pool Service could contact the supplier or retailer.

If you made a booking error, please contact Pool Service.

Type	Date	Status	From	To	Reference	Created on	cbi8	chep euro	cbi11	ipp euro	cbi7
Hand out	11/10/2023...	Planned	BC CoopCod...	Wijchen,Wh...		10/10/2023...	4000	20			
Hand out	11/10/2023...	Planned	BC CoopCod...	W. Heemske...		10/10/2023...			2112	33	
Hand out	11/10/2023...	Planned	BC CoopCod...	W. Heemske...		10/10/2023...				51	5100
Hand out	11/10/2023...	Planned	BC CoopCod...	W. Heemske...		10/10/2023...				33	
Hand out	11/10/2023...	Planned	BC CoopCod...	Vleams Con...		10/10/2023...				33	3300
Hand out	11/10/2023...	Planned	BC CoopCod...	ProMessa B.V.		10/10/2023...				17	
Hand out	11/10/2023...	Processed	BC CoopCod...	WSP Food B.V.		10/10/2023...	6600	33			
Hand out	11/10/2023...	In dispute	BC CoopCod...	Bakker Da...		10/10/2023...			1792	28	

4. Orders

- 1 Go to "Orders" (1).
Select the right date (2).
All orders in the future are shown.

The screenshot displays the 'Orders' section of the IPP Poolservice B.V. ACC system. On the left sidebar, the 'Orders' menu item is highlighted with a red circle labeled '1'. The main content area features a 'Filter' panel (circled '2') with a search bar and date/time selection options. Below the filter is a table of 'Existing orders (29)'. The table has columns for 'Order number', 'Reference number', 'Status', 'From', 'To', and 'Date'. The table contains 15 rows of order data, with the first three rows having a status of 'In review' and the remaining 12 rows having a status of 'Requested'. A red circle labeled '3' highlights the table area.

Order number	Reference number	Status	From	To	Date
2710769000082A0080248		In review	RC CoopCodi's Deventer	W. Heemskerk B.V.	12/10/2023
2710769000082A0080249		In review	RC CoopCodi's Deventer	W. Heemskerk B.V.	12/10/2023
2710769000082A0080250		In review	RC CoopCodi's Deventer	W. Heemskerk B.V.	12/10/2023
2712076000175A0077295.2		Requested	RC CoopCodi's Deventer	Zwanenberg Food Group	12/10/2023
2717354000007A0113485.1		Requested	RC CoopCodi's Deventer	WSP Food B.V.	12/10/2023
2710769000082A0080248.3		Requested	RC CoopCodi's Deventer	W. Heemskerk B.V.	12/10/2023
2710769000082A0080249.3		Requested	RC CoopCodi's Deventer	W. Heemskerk B.V.	12/10/2023
2710769000082A0080268.4		Requested	RC CoopCodi's Deventer	Profish Food B.V.	12/10/2023
2710769000082A0080279.4		Requested	RC CoopCodi's Deventer	Groenland kip B.V.	12/10/2023
2710769000082A0080281.5		Requested	RC CoopCodi's Deventer	GEER, VAN BEEK BV	12/10/2023
2710769000082A0080247.6		Requested	RC CoopCodi's Deventer	Dutch Grill Specialties BV	12/10/2023
2717354000007A0113485.1		Requested	RC CoopCodi's Deventer	WSP Food B.V.	12/10/2023
2710769000082A0080247.9		Requested	RC CoopCodi's Deventer	Dutch Grill Specialties BV	12/10/2023

Later 2 columns will be added with CBL type and CBL quantity.