TrackOnline

Instruction manual retailers

TRACK●NLINE
developed by BE✕TER

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.
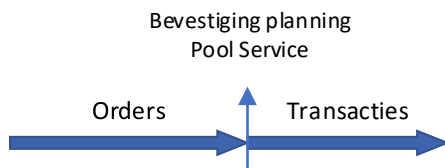
Steps in TrackOnline

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

General information

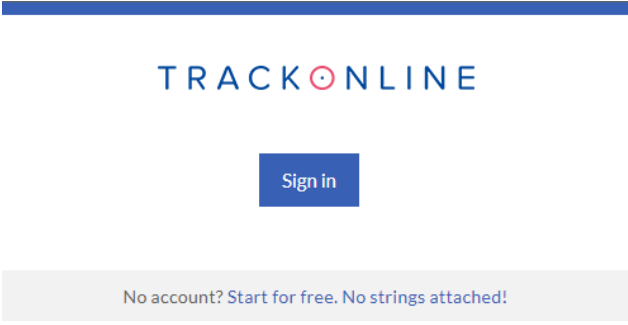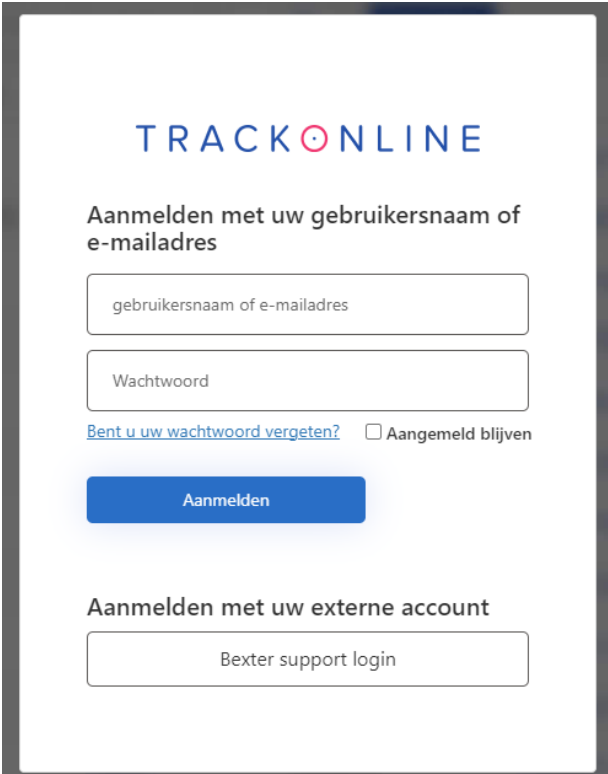An order can have 2 statuses in TrackOnline: Order and Transaction.

➔ 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.
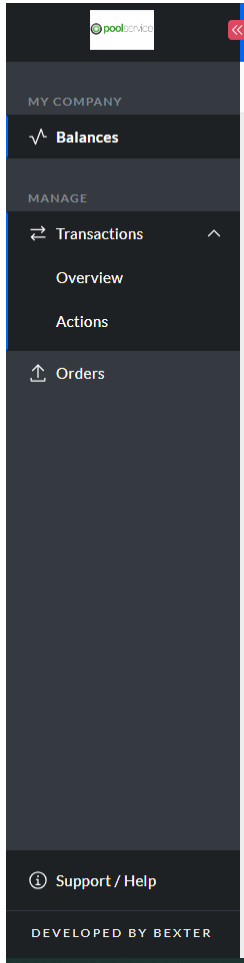
Bevestiging planning
Pool Service

Orders   Transacties

Next, all steps will be described separately.

1. Login

1	Go to: app.trackonline.com
2	Click Sign in

TRACKONLINE

Sign in

No account? Start for free. No strings attached!

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?"

TRACKONLINE
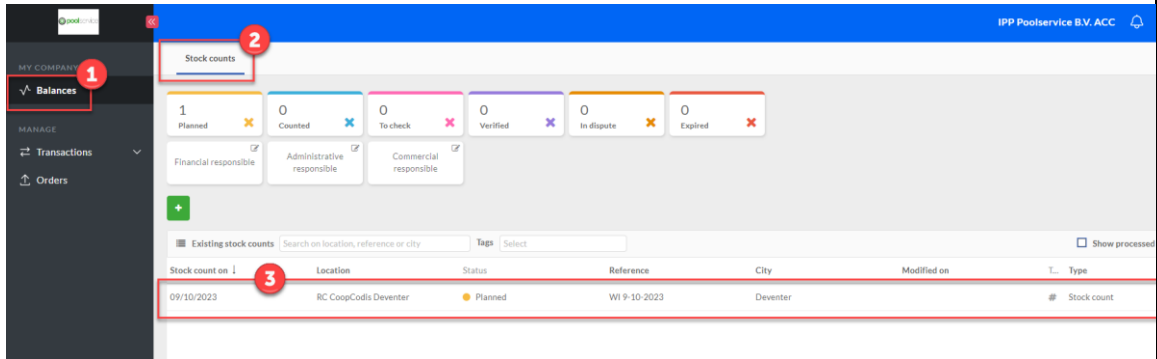
Aanmelden met uw gebruikersnaam of e-mailadres

gebruikersnaam of e-mailadres

Wachtwoord

Bent u uw wachtwoord vergeten?   ☐ Aangemeld blijven

Aanmelden

Aanmelden met uw externe account

Bexter support login

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

2. Stock count

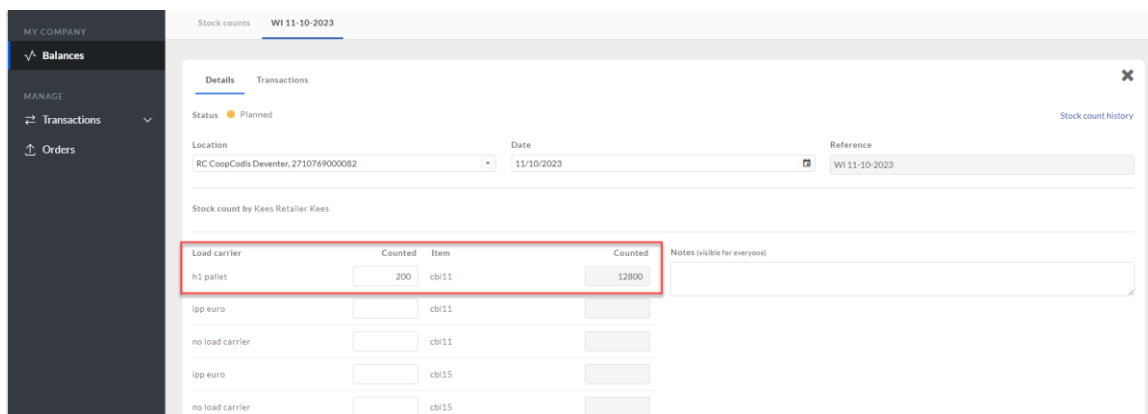|	
1	Go to "Balances" (1) and "Stock Counts" (2). Click on the line to open the planned stock count (3).
2	The screen for stock count entry opens. Fill in the amount of pallets. Correct entry goes as follows: - Enter the quantity of pallets for each type of pallet and CBL. - The system calculates the 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 ✎

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☰ 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.

2	This screen can be used to print or download tomorrows 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.

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.
	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".

   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".

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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.

4. Orders

1	Go to "Orders" (1). Select the right date (2). All orders in the future are shown. Later 2 columns will be added with CBL type and CBL quantity.