



QAD Adaptive Applications

User Guide

Delivery Exception Management

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QAD Precision 19
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Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference
September 2021/DEM 19	Enhanced Tracking History search information.	Page 4
	Enhanced information about icons.	Page 7
	Added Missing Mappings to Table 4.	Page 12
	Added Event Details fields and Extract to Table 5.	Page 16
	Added section on Missing Mappings.	Page 26-27
March 2021/DEM 18 - Revision 3.0	Added information about Close Deliveries button.	Page 9
	Added new rows to Deliveries Page Column Headers table.	Page 10, Page 12
December 2020/DEM 18 - Revision 2.0	Menu image revised to include Dashboards.	Page 2
	Corrected error in Message Area	Page 3
	Added section on icons in Tracking History section	Page 7
	Added New Incident section	Page 32
	Added Dashboards section	Page 36
	Added Options section	Page 38
June 2020/DEM 18 - Revision 1.0	Added section on Message Area	Page 3
	Package History renamed Tracking History	Page 9
	Added section on Status Update Entry	Page 34
January 2019/6.3	Initial version	--

Overview

Delivery Exception Management (DEM) is a web-based user portal for multi-carrier delivery exception tracking. Delivery information from different carriers is processed by the application, the data is standardized, and then stored as deliveries. DEM allows you to track the status of a package that has been shipped for any carrier using a standard set of events and issues.

The DEM module enables the shipper to:

- Integrate information from carriers into a standardized presentation of tracking statuses.
- Have a single portal for the management of tracking statuses and exceptions of shipments, both outbound and inbound, for all carriers.
- Track the movement of shipments from origin to destination.
- Monitor a carrier's adherence to its Service Level Agreement (SLA).
- Proactively identify potentially late or missed deliveries so that issues can be corrected or minimized.
- Provide an enhanced level of customer service regarding the tracking of shipments from departure to their end delivery.
- Identify and codify issues that may require investigation with the carrier; for example, to assist with subsequent claims processing for lost or damaged goods.

Information can be sourced from multiple carriers in different formats such as Electronic Data Interchange (EDI), Extensible Markup Language (XML), or Comma-Separated Values (CSV). This is converted to generic XML for processing, and the information is subsequently presented to the user in a clear, easy-to-read user interface.



Menu

The main menu is located on the left of the page. There are six menu options: [Exceptions](#), [Deliveries](#), [Incidents](#), [Tracking History](#), [Status Update Entry](#), and [Dashboards](#).

Fig. 1

Delivery Exception Management Menu

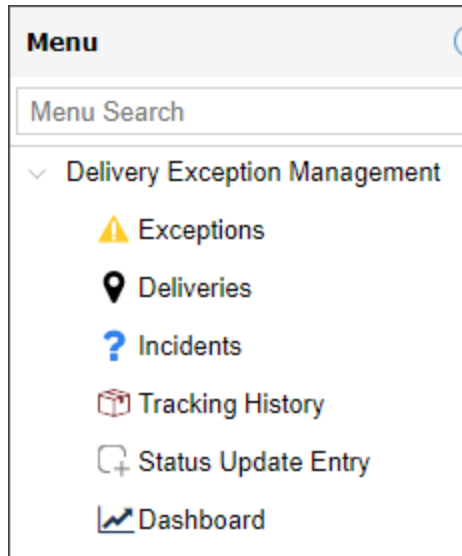


Table 1

Explanation of DEM Concepts

Concept	Explanation
Delivery	A Delivery is a shipment movement from one location to another.
Exception	An Exception is raised for a Delivery when a supplier communicates that a problem has occurred within the shipment movement, or the application determines that particular characteristics of the Delivery warrant further investigation.
Incident	An Incident is a user-activated update to an Exception. An Incident can be created to initiate communication with the supplier regarding the Exception.
Supplier	Supplier refers to the carrier company responsible for delivering the package.
Tracking Status Update	A Tracking Status Update is an update regarding an event relating to a Delivery. It can relate to a movement of the Delivery, or an issue impacting the movement of the Delivery. The update can be provided electronically by the Supplier, or applied manually by the user.
Status Update Entry	A Status Update Entry is a manual update for a delivery.

Message Area

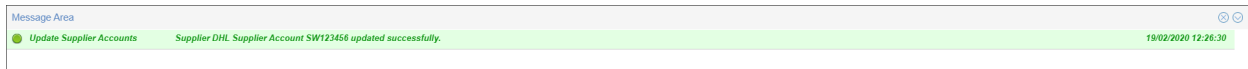
The Message Area displays a list of your DEM actions, or work history, which affect the DEM database. Your administrator can configure DEM to include information, warning, and error messages related to jobs. The most recent message appears at the top of the list.

To clear messages from the list, click the close button at the top right of the area.

To minimize the Message Area, click the minimize button at the top right of the area.

Fig. 2

Message Area



Tracking History

You can track the progress of a delivery by selecting the Tracking History page from the menu. You can search for the tracking history of an individual delivery by entering the Tracking Number in the search box at the top of the page.

Fig. 3

Tracking History Page

The screenshot displays the 'Tracking History' page. At the top, there is a search bar with 'Search By' options for 'Tracking Number' and 'Reference'. The 'Reference' option is selected, and the search box contains 'MSDCH20210622034351DEM'. A 'Type' dropdown menu is set to 'All'. There are 'Search' and 'Clear' buttons. To the right, there are icons for home, refresh, and print, along with a 'Sort By' dropdown menu.

The main area shows a vertical timeline of events:

- Delivered (grey dot)
- In Transit (blue dot) with date 'Fri, 25 Jun' and time '03:43'. Below it, the text reads 'DACHSER SE, MUENCHEN' and 'En route'.
- Picked Up (blue dot)
- Electronically Manifested (blue dot)
- Label Printed (blue dot)

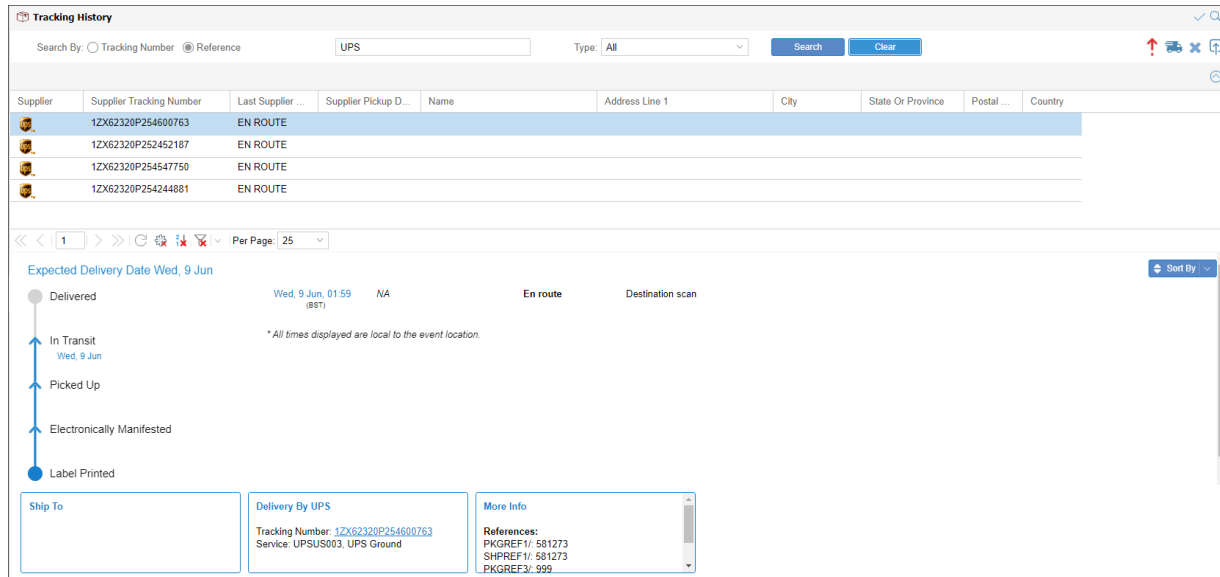
 A note below the timeline states: '* All times displayed are local to the event location.'

At the bottom, there are three panels:

- 'Ship To' (empty)
- 'Delivery By DACHSER' showing 'Tracking Number:' and 'Supplier Consignment Number:'.
- 'More Info' showing 'Signed By:' and 'References: CR: 00508183'.

You can also Search by Reference. Users can select what type of reference to search for, or select all. To search for a consignment of packages, enter the Supplier Consignment Number in the search box, select the Search By Reference option, and click Search. If there is more than one search result. The results are displayed at the top of the page and the tracking information for the first result is displayed below.

Fig. 4
Tracking History Page with multiple search results



To the left of the page, the progress of the Delivery, from its origin to destination, is displayed in the tracking bar. The completed steps appear blue in the tracking bar, and uncompleted steps remain gray. The tracking bar allows you to track the current status of a Delivery through the following steps:

Table 2
Tracking Bar Stages

Delivery Stage	Explanation
Label Printed	The shipping label of the Delivery has been created and the Delivery is awaiting pick-up by the supplier.
Electronically Manifested	The Delivery information has been electronically communicated to the supplier.
Picked Up	The Delivery has been picked up by the supplier.
In Transit	The Delivery is on the way from the shipper to the recipient.
Delivered	The Delivery has been delivered to its final destination by the supplier.

Fig. 5
Tracking History Timeline

Fri, 4 Jun, 12:00 (BST)	Delivered	Completed unloading at delivery location
Tue, 1 Jun, 12:00 (BST)	En route	Completed loading at pick-up location

To the right of the page, you can see a timeline of the progress of the Delivery. This timeline contains the status information for each location where delivery status information is provided . A longer description



of the status is also displayed when available. The most up-to-date information about the Delivery appears at the top of the page.

Table 3

Timeline Status Codes

Status Code	Explanation
Address Problem	There is a problem with the address provided for the Delivery, and the supplier might not be able to complete the Delivery.
Awaiting Collection	The delivery is waiting to be collected.
Cancelled	The delivery is canceled.
Change in Delivery	The details of Delivery have changed; for example, the address of the Delivery or the ETA date.
Collection Attempted	An attempt has been made to collect the delivery.
Collection Failed	The pick-up of the Delivery was not successful by the supplier.
Customs Issue	There is an issue with processing the Delivery through international customs processing.
Delay Expected	It is anticipated that the Delivery will be late.
Delivered	The delivery was delivered successfully.
Delivery Attempted	An unsuccessful attempt was made to deliver the package to the recipient.
Delivery Failed	The delivery was not delivered successfully.
Delivery On Hold	The delivery is stopped pending some action.
Delivery Refused	The delivery was refused by the recipient.
En Route	The Delivery is in transit between the shipper and the recipient.
Exception	Miscellaneous problem with the Delivery.
Late Delivery	The delivery was delivered late.
Lost Damaged	The delivery was lost or damaged in transit.
Manifest Complete	The electronic manifesting of the Delivery information has been successfully completed.
Missed Delivery Date	The delivery was not completed by the expected date.
No Activity	There have been no updates from the supplier within the specified time period.
Out For Delivery	The delivery is on the way to its final destination.
Pickup Failed	The delivery was not picked up.
Shipment Returned	The delivery was returned.
Shipper Approval	This status refers to a delivery that has stopped pending some action from the shipper.

The bottom of the page contains three panels:

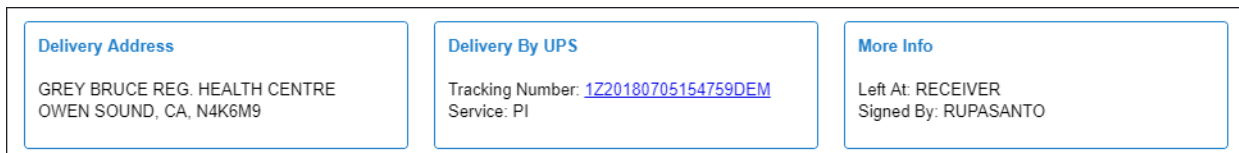
Delivery Address. This panel contains the full name and address of the recipient.

Delivery by [Supplier]. This panel contains a link to the tracking page on the supplier's own website. This panel also contains the carrier service being used.

More Info. This panel contains miscellaneous information.

Fig. 6

Tracking History Panels



The Delivery Address panel contains the name and address of the Delivery recipient. The Delivery by [Supplier] panel contains the supplier's tracking number, and is linked to the supplier's own tracking page. The Delivery by [Supplier] panel also contains the supplier service code of the Delivery.

Icons

Users can view information about a delivery at a glance in the Tracking History page and also from the Tracking History window associated with a delivery. Icons appear at the top right corner of the Tracking History page and window with extra information about the delivery.

Fig. 7

Tracking History Page with icons

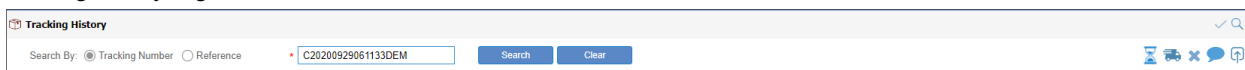





Fig. 8


Tracking History window with icons



If an Exception has been raised against the Delivery, an icon indicating the severity of the Exception appears on the top line of the Tracking History page, next to the search field. If you hover over the icon the Exception type is displayed alongside the severity level. Click this icon to view the Exception in the Exceptions page. For more information about Exceptions, see [Exceptions](#).

The Under Review icon  and the Awaiting Feedback icon  indicate that an Incident has been raised against this delivery. Click the icon to view the Incident in the Incidents page. For more information, see [Incidents](#).

Click the Proof of Delivery Upload icon  to upload a proof of delivery file for this delivery. Compatible file types include: GIF, JPEG, PNG, and PDF. If a Proof of Delivery file has already been uploaded you can view it here.

The Find Shipment Transaction icon  appears on the Tracking History page for all deliveries where Shipment Transaction information is available. If you click this icon, the View Shipment Transaction page is opened. Here you can review the Shipment Transaction for this delivery.


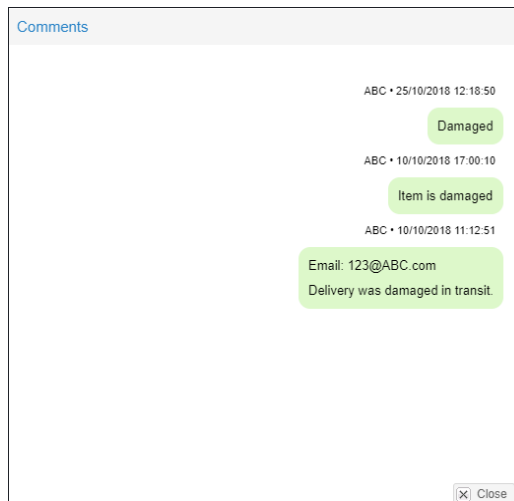

If a comment has been added to a Delivery, a blue Comment icon  is visible in the Tracking History page. The icon appears on the top line of the page, next to the search field. If you click on the Comments icon, a Comments window is opened. Here you can view all existing comments that are added to the Delivery. For more information, see [Comments](#).

Fig. 9

Comments Window



If the evaluation for a delivery is pending, the Perform Evaluation icon  appears on the Tracking History page. To perform the evaluation for this delivery manually, click the icon.


Click the Close Delivery icon  to mark the selected delivery as closed.

Fig. 11
Deliveries Columns

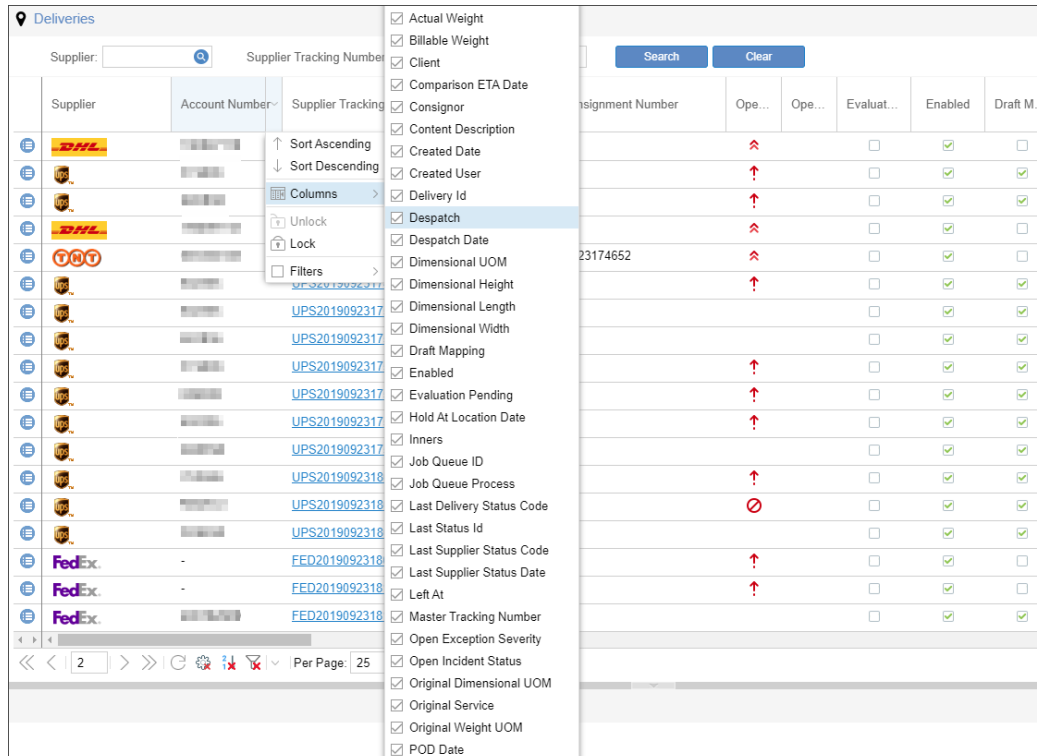


Table 4
Deliveries Page Column Headers

Column Header	Explanation
Account Number	The supplier account number associated with the Delivery.
Actual Weight	The actual weight of the Delivery.
Billable Weight	The billable weight of the Delivery.
Client	If this field is filled, you can link to the Shipment Inquiry from the Tracking History page.
Closed	This field contains a check box. If the box is checked, the delivery is closed and will no longer be updated.
Consignor	If this field is filled, you can link to the Shipment Inquiry from the Tracking History page.
Content Description	The description of the contents in a Delivery. This is not currently populated, but may be populated in the future by TE.
Created Date	The date the Delivery transaction was created.
Created User	The user who created the Delivery.
Current Comparison ETA Date	This is the system-calculated ETA Date that is used by DEM when checking for an expected and possibly updated ETA Date. This is taken from the Supplier Current ETA date where available. If the Supplier Current ETA Date field is not completed, then the value is taken from the Original Comparison ETA Date.

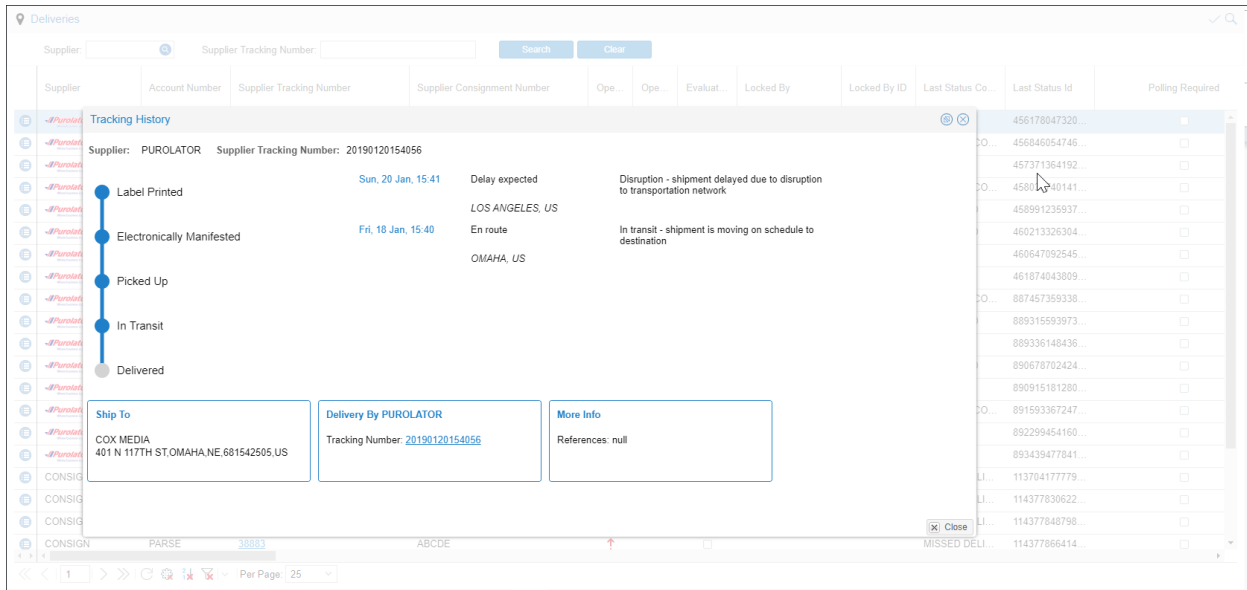


Delivery Id	This is the unique identifier for a Delivery transaction.
Despatch	This is the Despatch number received from the TMS application.
Despatch Date	This is the date that the Delivery was despatched by the shipper.
Dimensional Height	The height dimension of the Delivery.
Dimensional Length	The length dimension of the Delivery.
Dimensional UOM	The unit of measurement applicable to the dimension fields on the Delivery. This might have been converted from a supplier UOM code [Original Dimensional UOM].
Dimensional Width	The width dimension of the Delivery.
Draft Mapping	This is an indicator of whether there are code conversions that were not completed for the Delivery. It is set to <i>true</i> , when the Code Conversion process fails during the creation of a Delivery History. For more information on Code Conversions, see <i>Administration Guide - Code Conversions In</i> .
Enabled	This is a check box, if the box is ticked the delivery is enabled for processing. If the box is not ticked the delivery is not enabled for processing. This can be configured by your administrator, for more information, see <i>Administration Guide - Supplier Accounts</i> .
Evaluation Pending	If this box is checked it is an indication that more delivery information may be available, but the Background Job which completes some fields has not been carried out yet. If you notice missing fields in the delivery page, you should check Evaluation Pending to determine if the information is pending. For more information on Backgrounds Jobs, see <i>Administration Guide</i> .
Hold at Location Date	If the Delivery is to a supplier's hub, then this is the latest date that the package can be collected from the supplier hub by the recipient.
Inners	The number of inner packages inside the main Delivery package.
Job Queue ID	This field contains a link to the Job Queue window. Administrators can view information about the job queue related to this delivery.
Job Queue Process	This is the type of job that is processing this delivery.
Last Delivery Status Code	A brief description of the last status update for the Delivery. This is a standardized code, and might have been converted from a supplier status code. This information can be derived from either the supplier, or the system.
Last Status ID	A database sequence that is the unique identifier for a Delivery History record. For more information, see Delivery History . This is set every time the system receives an update from a supplier.
Last Supplier Status Code	The last status update code received from the supplier. This is a standardized code, converted from a supplier status code.
Last Supplier Status Date	The date the Last Supplier Code was received from the supplier.
Left At	The location where the supplier left the Delivery.
Master Tracking Number	This is the lead tracking number for a shipment. In the case of a multi-piece shipment, this is considered the primary tracking number for the shipment as a whole.

Missing Mappings	By clicking the hyperlink in the <i>Missing Mappings</i> column, users can view conversion issues that have been recorded against a delivery. Conversion issues are raised if the evaluation cannot convert any external codes - such as countries and status codes - to the internal code. The issue is resolved by adding the missing conversion and re-running the evaluation.
Open Exception Severity	An icon that indicates whether an Exception has been raised against the Delivery. You can roll over the icon to see the severity level for the Exception.
Open Incident Status	An icon that indicates whether an Incident has been raised against the exception. You can roll over the icon to see the status of the Incident.
Original Comparison ETA Date	This is the system-calculated ETA Date that is used by DEM when checking for an Original Expected ETA Date. This is taken from the Supplier Original ETA Date, if this field is completed. If the Supplier Original ETA Date field is not completed, then the value is taken from the Shipper ETA Date.
Original Dimensional UOM	The original dimension unit of measurement provided by the supplier.
Original Service	This is the product or service code provided by the supplier.
Original Weight UOM	The original weight unit of measurement provided by the supplier.
Package Count	The number of packages in a Delivery.
POD Date	Date that Proof of Delivery was logged by the supplier.
Polling Required	This is a check box. It is ticked if polling is required for deliveries from this carrier.
Rating Zone	The supplier rating zone for this Delivery.
Reference 1	Administrators can specify the information to fill this field in Admin Settings. Possible values include; Shipment Order number, End of Day Batch number, and Customer Reference number. For more information, see <i>Administration Guide</i> .
Reference 2	Administrators can specify the information to fill this field in Admin Settings. Possible values include; Shipment Order number, End of Day Batch number, and Customer Reference number. For more information, see <i>Administration Guide</i> .
Reference 3	Administrators can specify the information to fill this field in Admin Settings. Possible values include; Shipment Order number, End of Day Batch number, and Customer Reference number. For more information, see <i>Administration Guide</i> .
Service	This is the standardized code for the supplier product or service of the Delivery, and might have been converted from a carrier service code.
Service Description	This is the description of the product or service applied by the supplier to the Delivery.
Ship To	The name and full address of the recipient of the Delivery.
Shipment Direction	States whether this is an Inbound or Outbound delivery.
Shipment Reference	The reference number associated with the shipment that the delivery is part of.
Shipper	The name and full address of the shipper of the Delivery.

Shipper ETA Date	This is the estimated time of arrival for the Delivery, as determined by the shipper.
Shipper Promise Date From	This is the earliest date of delivery guaranteed by the shipper to the recipient.
Shipper Promise Date To	This is the latest date of delivery guaranteed by the shipper to the recipient.
Signed By	The name of the person who signed for the Delivery.
Source System	This identifies the source system that the Delivery was created from. It is usually the identifier of a TMS application.
Supplier	This is the logo of the carrier company carrying out the delivery.
Supplier Consignment Number	A number which identifies the consignment a delivery is part of.
Supplier Current ETA Date	This is the current estimated delivery date according to the supplier.
Supplier Delivery Date	The date the supplier delivered the package to the end destination of the Delivery.
Supplier Manifested Date	The date that the delivery was manifested to the supplier by the shipper. This is when the shipment information was communicated electronically to the supplier by the shipper.
Supplier Original ETA Date	This is the original estimated delivery date provided by the supplier.
Supplier Pickup Date	The date the supplier picked up the Delivery from the shipper.
Supplier Tracking Barcode	This is the barcode of the delivery which the Supplier uses to maintain tracking information.
Supplier Tracking Number	This is the tracking number of the delivery which the Supplier uses to maintain tracking information. The Supplier Tracking Number contains a hyperlink. If you click this hyperlink a Tracking History window, containing the same information as the Tracking History page, opens.
Weight UOM	The unit of measurement applicable to the weight fields on the Delivery. This might have been converted from a supplier UOM code.

Fig. 12
Tracking History Window



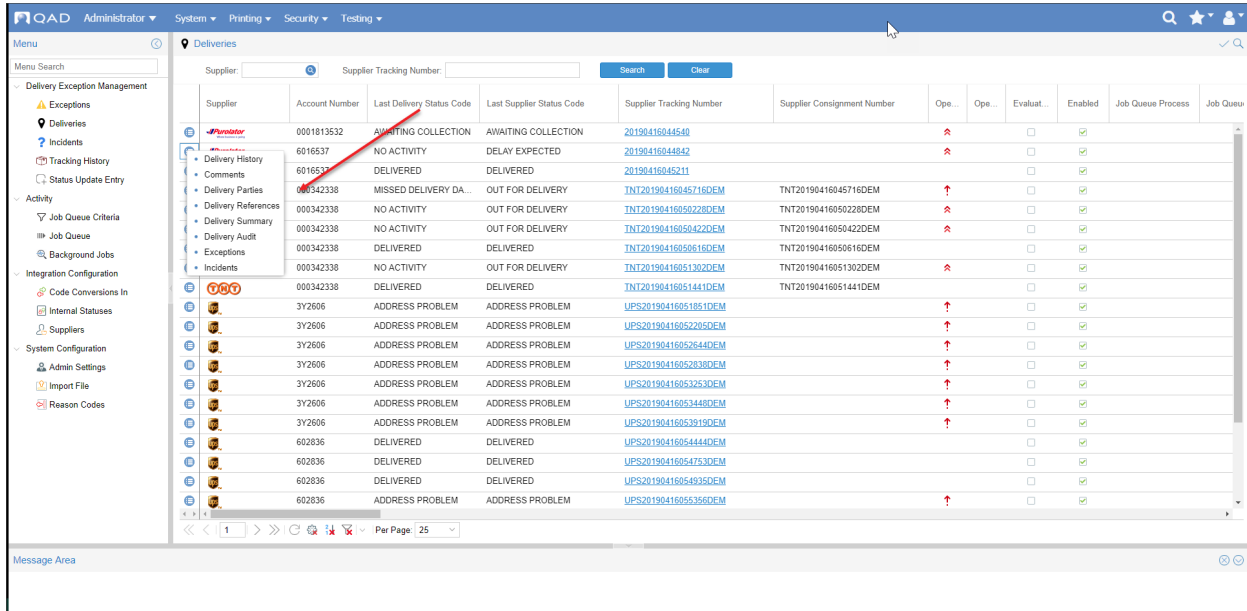
Delivery Sub-Option Menu

To the left of each delivery there is a sub-option button. Here you have the option to add or view details under the following sub-options:

- [Delivery History](#)
- [Comments](#)
- [Delivery Parties](#)
- [Delivery References](#)
- [Delivery Summary](#)
- [Delivery Audit](#)
- [Exceptions](#)
- [Incidents](#)
- [Missing Mappings](#)



Fig. 13
Delivery Sub-options



Delivery History

The first option in the sub-option list is Delivery History. The Delivery History window shows a list of the status updates that are received from an external source, such as the supplier or a TMS. The data shows the status update codes received from the external source, as well as the internal status codes that were determined by the code conversion process.

This grid is useful if you want to view all the low-level data that comes from the supplier for a specific delivery. The information is read-only and cannot be modified from the UI.

The statuses are listed in order, with the latest events or problems to occur listed first.



Fig. 14

Delivery History Window

Supplier Status 1	Scan Status 1	Scan Status 2	Scan Status 3	Status Country	Status Date
D	DELIVERED			US	2021/08/01 05:16:00
AG	EN ROUTE			US	2021/07/31 05:16:00
CO	EN ROUTE			CN	2021/07/29 05:16:00

Table 5

Delivery History Columns

Column Header	Explanation	
Address Line 1,2	The address of the status location.	
Created Date	This is the date that the Delivery history record was created.	
Created User	This is the user that created the Delivery history record. Records created by interfaces will show SYSTEM in this field. Where records are created by manual tracking status entry, the user specified is the logged-in user.	
Evaluation Applied	This is a check box. If the box is ticked, evaluation has taken place.	
Evaluation Pending	This is a check box. If the box is ticked, evaluation is still pending.	
Event Details	Status Date	This is the date, supplied by the supplier, that this activity has occurred.
Event Details	Notification Date	The date the user was notified of the activity.
Event Details	Time Zone ID	This field states the time zone used in the Event Details fields.
Extract		This is an ID number that references the related Extract. You can use this ID number to view Extract information in the Extracts page.
File Name		This is the name of the file that the Delivery history record was created from, if the source of the data was an interface file.
Name		This field contains the status location name.
Notification Date		This field is not currently in use by DEM.



Original Status City	The city the delivery was dispatched from.
Original Status Country	The country the delivery was dispatched from.
Original Status State	The state the delivery was dispatched from.
Revised ETA Date	This is the updated anticipated delivery date and time for the Delivery, as communicated by the supplier in a status update.
Scan Status 1	This field contains an exception code or a movement code, depending on what information is available from the supplier when providing a Tracking Status Update.
Scan Status 2	This is populated if there is a second Scan Status value.
Scan Status 3	This is populated if there is a third Scan Status value.
Status City	This is the city where the activity for this Delivery history has occurred.
Status Country	This is the country where the activity for this Delivery history has occurred.
Status Date	This is the date, supplied by the supplier, that this activity has occurred.
Status ID	This is the unique ID for the Delivery history record.
Status Postcode	This is the postcode where the activity for this Delivery history has occurred.
Status State	This is the state or province where the activity for this Delivery history has occurred.
Status User	This field is not currently in use by DEM.
Supplier Status (1-3)	These are the multiple status codes received from the supplier for a Delivery history.
Supplier Status Description (1-3)	These are the multiple status code descriptions received from the supplier for a Delivery history.
Update Event Date	This field is not currently in use by DEM.

Comments

The second option in the sub-option menu is Comments. This sub-option allows you to view all comments that have been added against a Delivery. You can also add new comments in this window. When an incident is created, the e-mail that is sent to the carrier is stored as a comment.

Fig. 15

Comments Window

Comment	Reason Code	Email	Source	Created User	Created Date
Order to be resent		abc@123.ie	SUPPLIER		09/10/2018 16:35:19
Damaged goods		abc@qad.com	INCIDENT	KFT	09/10/2018 16:33:58
Incident has occurred		abc@123.ie	INCIDENT	QCONFIG	02/10/2018 02:48:15

Table 6

Comments Window Column Headers

Column Header	Explanation
Comment	This column contains the comment text. You can view the full text by rolling over the comment.
Created User	This column displays the user who created the comment, or the Incident that resulted in this comment being created.
Created Date	The date that the comment was created.
Reason Code	Shorthand codes for frequently used comments.
Source	The source of the comment. This may be either Incident or User.
E-mail	The e-mail address or addresses that the comment was sent to.

You can use the Add Comment button to the bottom right of the page to add new comments. You can write your own comments, or select a shorthand code from the drop-down list.



Fig. 16

Add Comment Window

Table 7

Suggested Reason Codes

Reason Code	Description
CUSTOMS_DOCS	The customs documentation was prepared incorrectly. The following information is missing: [insert info here]
DELAY_AT_SHIPPING	The calculated ETA date was incorrect. The shipment was not picked up on the original ship date.
INCORRECT_ADDRESS	The address in the party address book was incorrect for this recipient. The address needs to be corrected for future shipments.

To create your own Reason Codes for use with DEM, see *Administration Guide*.

Delivery Parties

Delivery Parties is the third option in the sub-option menu. In the Delivery Parties window, you can view all of the parties related to the delivery. This typically includes the shipper and recipient, but might also include other parties such as the billing party.

Fig. 17

Delivery Parties Window

Source System	Party Type	Account Number	Party Id	Party Name	Contact Name	City	County	State Or Pr...	Country
UPS	SHIPTO							MS	NZ
UPS	SHIPPER								IE

Table 8

Delivery Parties Column Headers

Column Header	Explanation
Account Number	The supplier account number associated with the Delivery party.
Address Line 1,2,3,4,5	The full address line details of the Delivery party.
City	The city that the Delivery party is located in.
Contact Name	The name of the person to be contacted in relation to this Delivery party.
Country	The country that the Delivery party is located in.
Created Date	The date the Delivery party was created.
Created User	The user who created the Delivery party.
Email	The contact e-mail address of the Delivery party.
Party Name	The name of the Delivery party.
Party Type	The type of Delivery party; for example, Shipper.
Phone	The phone number of the Delivery party.
Postal Code	The postal code that the Delivery party is located in.

State or Province	The state or province that the Delivery party is located in.
-------------------	--

Delivery References

This window contains information about Delivery References.

Fig. 18
Delivery References Window

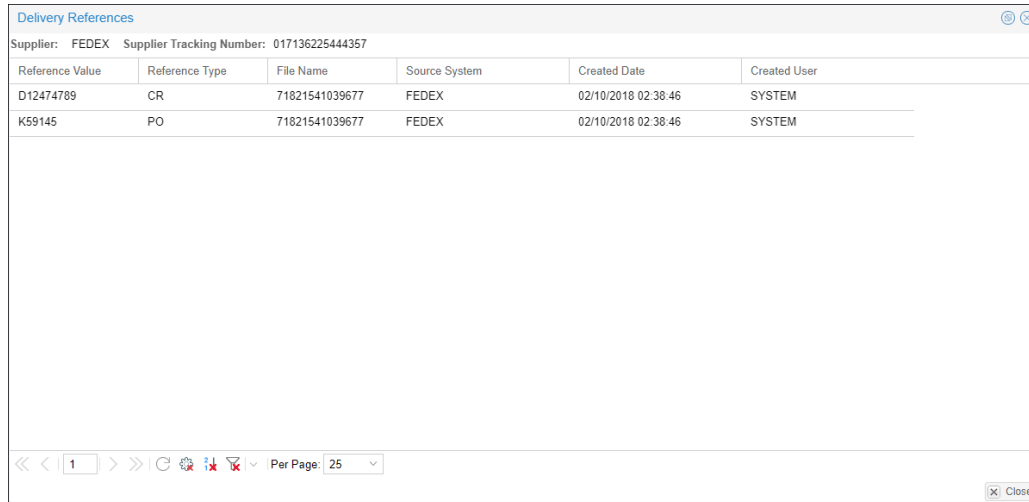


Table 9
Delivery Reference Columns

Column Header	Explanation
Created Date	The date the Delivery reference was created.
Created User	The user who created the Delivery reference. The Created User is always set to a value of SYSTEM.
File Name	This is the name of the file that the Delivery reference record was created from, if the source of the data was an interface file.
Source System	The source system that the Delivery reference record was created from. This can be the supplier code or a TMS. An example of a supplier code is UPS. An example of a TMS is QAD Precision.
Reference Type	This is the type of reference stored in the Delivery reference record. These can be qualifier values from a supplier's tracking status file.
Reference Value	This is the value of the reference stored in the Delivery reference record.



Delivery Summary

This window provides a summary of Delivery details. This page displays the most useful information from all of the Delivery sub-options.

At the top of the window is a blue bar that contains the supplier, tracking number, and delivery status.

A series of dates appears beneath this. These dates may include the Shipper Despatched On date, the supplier Picked Up On date, the supplier Original ETA date, the supplier Current ETA date, and the Comparison ETA date. The dates displayed here depend on the data available from the supplier.

Under the More Info heading, you can see information that can vary. It can include Master Tracking Number, References, Dimensions, and Actual Weight.

To the right of the window, there are three boxes containing Ship From, Ship To, and Service information. The Ship From and Ship To boxes contain the name and address of the delivery origin and destination. The Service box contains a standardized code for the supplier product or service of the Delivery.

Fig. 19

Delivery Summary Window

The screenshot shows a window titled "Delivery Summary" with a blue header bar containing "FEDEX" and "017136225444357". Below the header, the following information is displayed:

- Shipper Despatched On: Wed, 18 Jul, 00:00
- FEDEX Picked Up On: Wed, 18 Jul, 21:29
- FEDEX Original ETA: Fri, 20 Jul, 00:00
- FEDEX Current ETA: Fri, 20 Jul, 00:00
- Comparison ETA: Fri, 20 Jul, 00:00

Under the "More Info" heading, the following information is displayed:

- References: D12474789, K59145
- Billable Weight: 2 L
- Actual Weight: 2 L

On the right side of the window, there are three boxes:

- Ship From:** DEM Warehouse, 742 Main Street, JONESTOWN, PA, U, 12347833S
- Ship To:** TEAM OF US, 123 High Street, JACKSONVILLE, FL, US, 123460000
- Service:** 019

A "Close" button is located in the bottom right corner of the window.

Delivery Audit

In the Delivery Audit window you can view the status of the Background Jobs which have been performed for the delivery. For more information on Background Jobs, see the *Administration Guide*.

Fig. 20

Delivery Audit Window

Job Name	Start	End ↓	Elapsed Time	Job Code	Description
Delivery Evaluation (Manual)	10/06/2019 14:36:01	10/06/2019 14:36:01	00:00:00.014		
Delivery Evaluation (Manual)	10/06/2019 14:35:04	10/06/2019 14:35:04	00:00:00.012		
Delivery Evaluation (Manual)	10/06/2019 14:34:07	10/06/2019 14:34:07	00:00:00.013		
Delivery Evaluation (Manual)	10/06/2019 14:33:06	10/06/2019 14:33:06	00:00:00.019		

Table 10

Delivery Audit Columns

Column Header	Explanation
Description	A description of the function of the Background Job performed.
Elapsed Time	The length of time the Background Job took.
End	The time the Background Job was completed.
Job Code	The code associated with the Background Job performed.
Job Name	The name of the Background Job performed.
Start	The time a Background Job was started.
User	The user who initiated the job.

Exceptions

Click on the Exceptions sub-option to open the Exceptions window. The Exceptions window displays summary information about all Exceptions associated with the Delivery. For more information on Exceptions, see the main [Exceptions](#) section.



Fig. 21
Exceptions Window

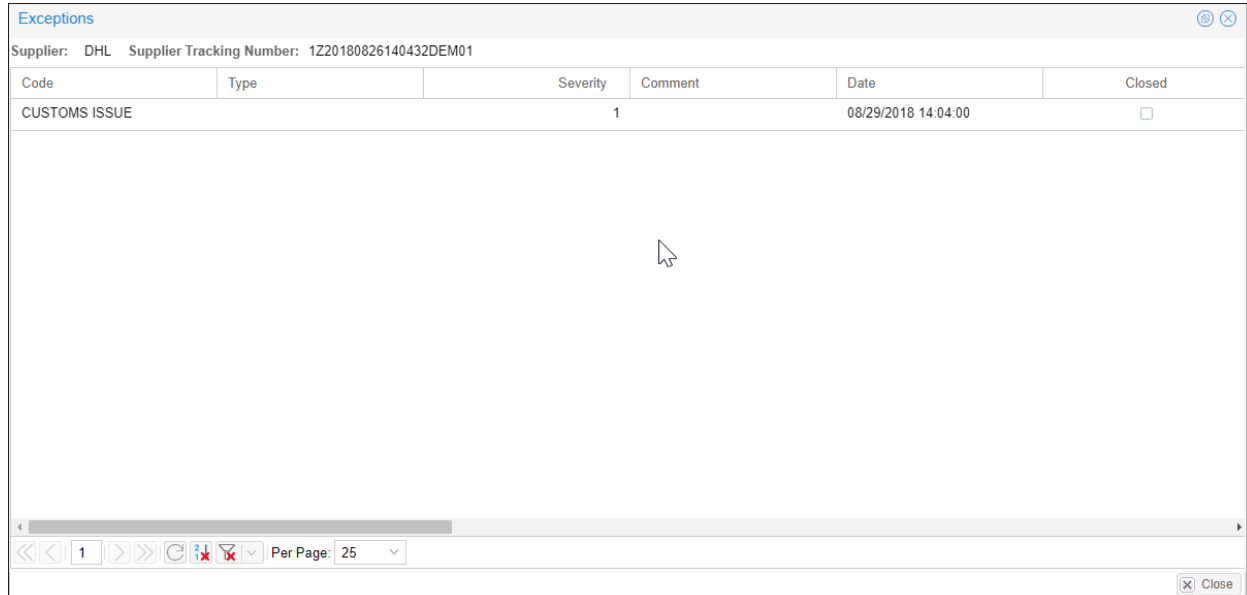


Table 11
Exceptions Columns

Column Header	Description
Account	The supplier account number associated with the Delivery.
Closed	This box is checked if an Exception is resolved, or closed. If the Exception is open, this box is not checked.
Closed By	This is the User who closed the Exception.
Closed Date	This is the date that the Exception was closed.
Code	This is the internal code associated with the Exception.
Comment	The Comment added by the user when the Exception was closed appears here. If the Exception is open, this field is blank.
Created Date	This is the date that the Exception was created.
Created User	This is the user who created the Exception.
Exception Date	The date that an Exception occurred, according to information communicated by the supplier.
Description 1	This is the description of the Exception code.
Description 2	This is generated from the Delivery History status description 2, when filled. This is currently only in use for the UPS supplier.
Description 3	This is generated from the Delivery History status description 3, when filled. This is currently only in use for the UPS supplier.



Severity	The Severity level of the Exception: <ul style="list-style-type: none"> • 1 is High severity • 2 is Medium severity • 3 is Low severity
Snoozed Until	This is the date/time that the Exception will be re-displayed on the Exception page if it is currently snoozed. This date/time is in UTC format.
Supplier	The carrier company responsible for the movement of the Delivery.
Tracking Number	The supplier Tracking Number associated with the Delivery.

Incidents

Click on the Incidents sub-option to open the Incidents window. The Incidents window displays summary information about all incidents associated with the delivery. For more information on incidents, see the main [Incidents](#) section below.

Fig. 22

Incidents Window

The screenshot shows a window titled "Incidents" with a header bar containing "Supplier: DHL" and "Supplier Tracking Number: 1Z20180827140357DEM02". Below the header is a table with the following data:

Incident	Type	Status	Comment	Exception	Exception Code
200203687571255	LOST	3-CLOSED	sdfgsadfg	126198893460900	CUSTOMS ISSUE
396264866736065	LATE	1-REVIEW	Response back which shoul...	126198893460900	CUSTOMS ISSUE

At the bottom of the window, there is a pagination control showing "Per Page: 25" and a "Close" button.

Table 12

Incidents Column Headings

Column Header	Description
Account	The supplier account number associated with the Delivery.
Closed	This box is checked if an Incident is resolved. If the Incident is open, this box is not checked.
Closed By	This is the user who closed the Incident.
Closed Date	This is the date that the Incident was closed.
Comment	The comment added to the Incident by the user.



Created Date	This is the date that the Incident was created.
Created User	This is the user who created the Incident.
Exception	This is the unique ID of the Exception that this Incident was raised against.
Exception Code	This is the Code of the Exception that this Incident was raised against.
Incident	This is the unique ID of the Incident.
Raised By	This is the user who raised the Incident.
Raised Date	This is the date that the Incident was raised.
Status	<p>The status of the Incident:</p> <ul style="list-style-type: none"> • Review: This means the Incident has been updated by the supplier and is currently awaiting a response from the user. • Awaiting Feedback: This means that the supplier has not yet responded to the most recent update from the user.
Supplier	The carrier company responsible for the movement of the Delivery.
Tracking Number	The tracking number associated with the delivery that the incident is raised against.
Type	<p>This is the category type for the Incident. The three default types are:</p> <ul style="list-style-type: none"> • Late • Lost • Damaged <p>Any additional types will be added by QAD Precision, if applicable, in the future.</p>

Missing Mappings

In this window, users can view conversion issues that have been recorded against a delivery. Conversion issues are raised if the evaluation cannot convert any external codes - such as countries and status codes - to the internal code. The issue is resolved by adding the missing conversion and re-running the evaluation.

Fig. 23

Missing Mappings Window

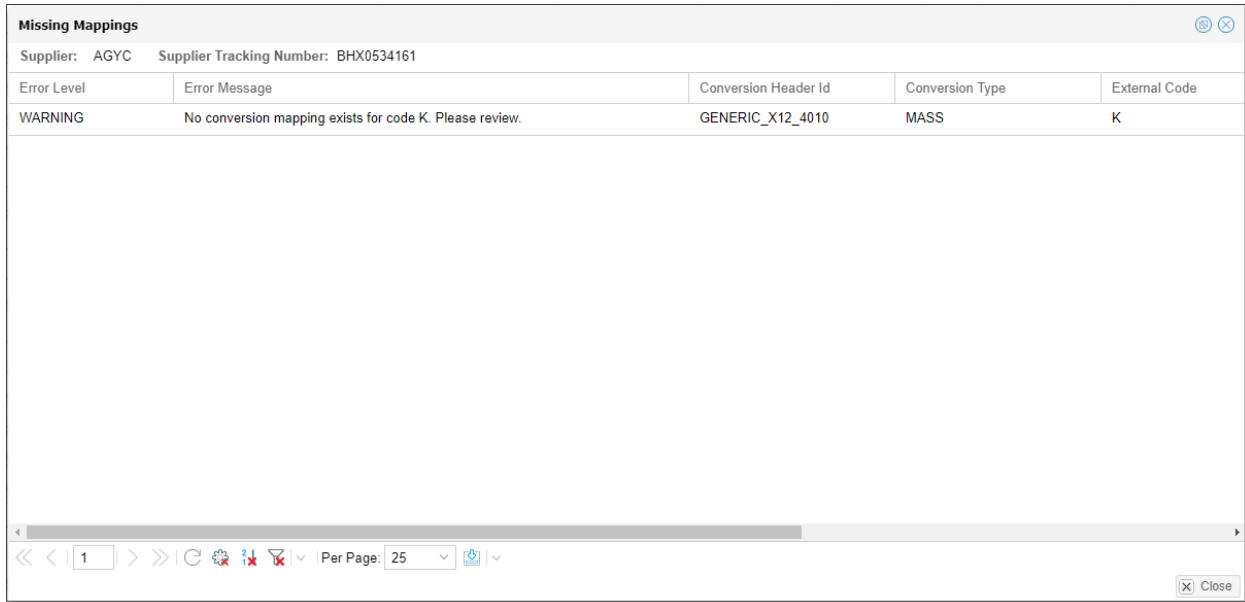


Table 13

Missing Mappings Column Headers

Column Header	Description
Conversion Header Id	This field contains the Conversion Code.
Conversion Type	This field contains the type of Code Mappings.
Created Date	This is the date that the Incident was created.
Created User	This is the user who created the Incident.
Delivery Id	This field contains the Delivery Code.
Error Level	This value can be ERROR or WARNING. Only ERROR entries are included in the mappings page.
Error Message	This field describes the type of issue that has occurred.
External Code	This is the code that the system could not map to an internal code.

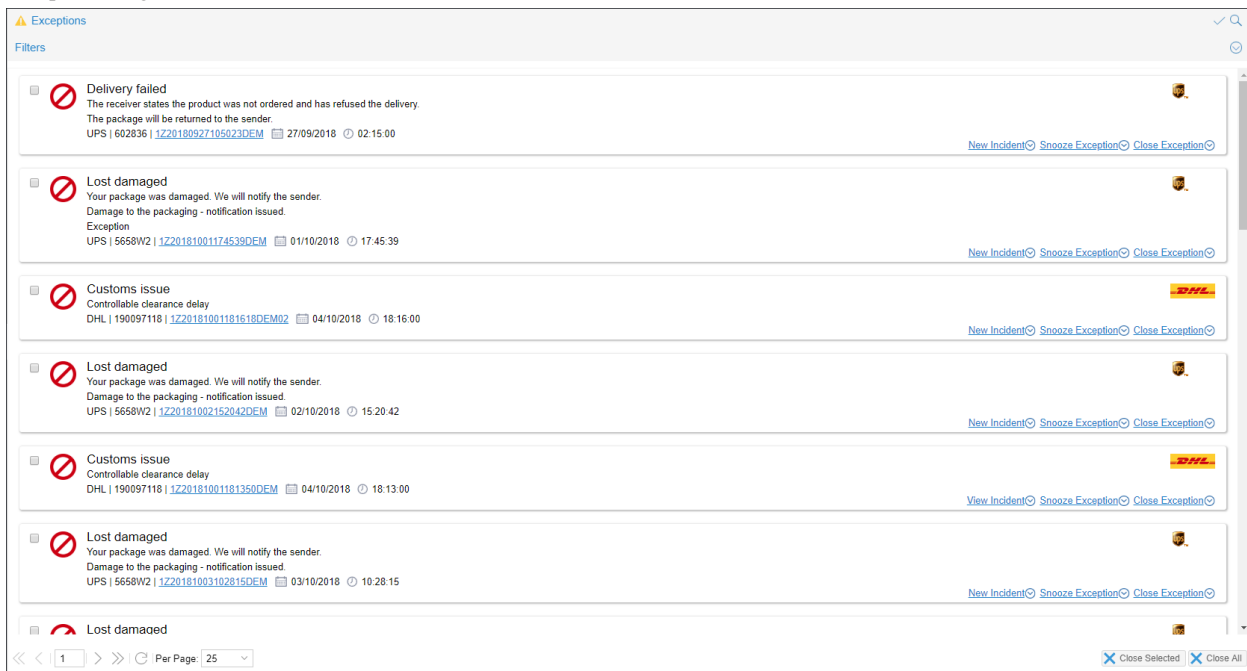


Exceptions

DEM examines the status information it receives from the suppliers. If a Delivery is likely to encounter a delay, an Exception is raised against the Delivery.

There can only be one open Exception against a Delivery at any given time. If a new Exception arises against a Delivery, the previous one is automatically closed. Exceptions can also be closed manually by the user. Exceptions are automatically closed when the carrier indicates that the Delivery has been delivered.

Fig. 24
Exceptions Page






Exception Severity

The severity of the Exception is driven by the configuration of the internal status codes. For more information on internal status codes, see the *DEM Administration Guide*. There are three available severity levels, and each one is indicated by the corresponding red icon to the left of the exception title on the Exceptions page.

Table 14

Exception Severity Levels

Icon	Severity Description
	1 - High
	2 - Medium
	3 - Low

Exception

An Exception contains an icon that indicates the severity of the Exception, a brief description of the delay, the supplier, the account number, the tracking number, and the date and time of the exception update.

Fig. 25

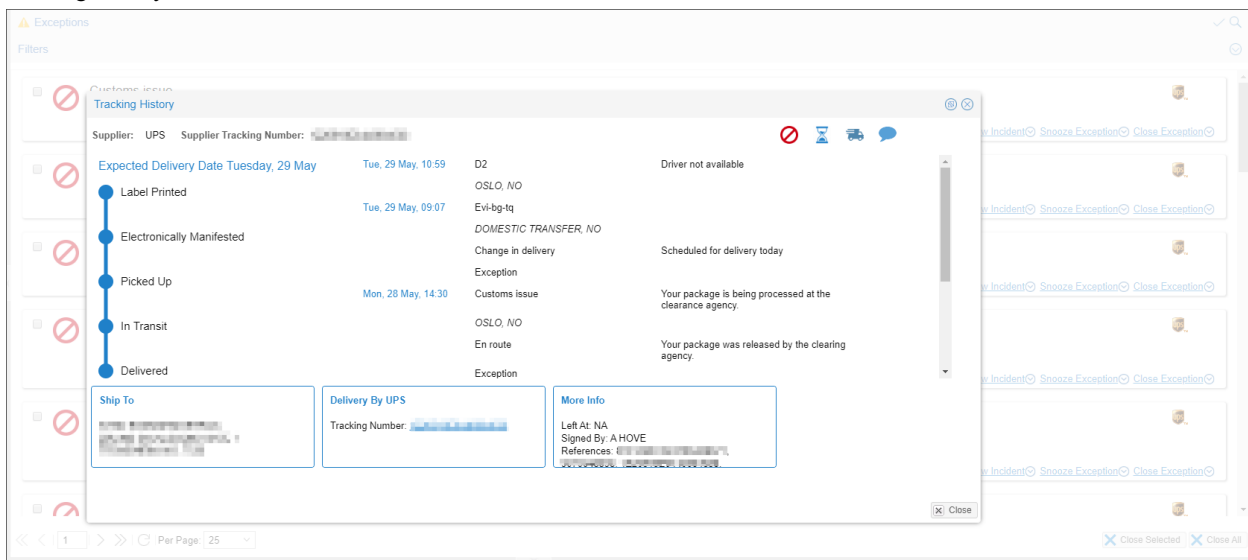
An Exception



The tracking number contains a hyperlink. Click this link to open the Tracking History window. For more information, see [Tracking History](#).

Fig. 26

Tracking History Window



To the bottom right of the exception, there are three options. You can choose to create a New Incident, Snooze Exception, or Close Exception.



New Incident

You can create a new Incident for an Exception by clicking the New Incident button to the bottom right of the exception. There are two mandatory fields; Type and Comment. For more information on creating Incident Types, see the *Administration Guide*. There is also an optional Email field that allows you to send the details of the Incident to an e-mail address.

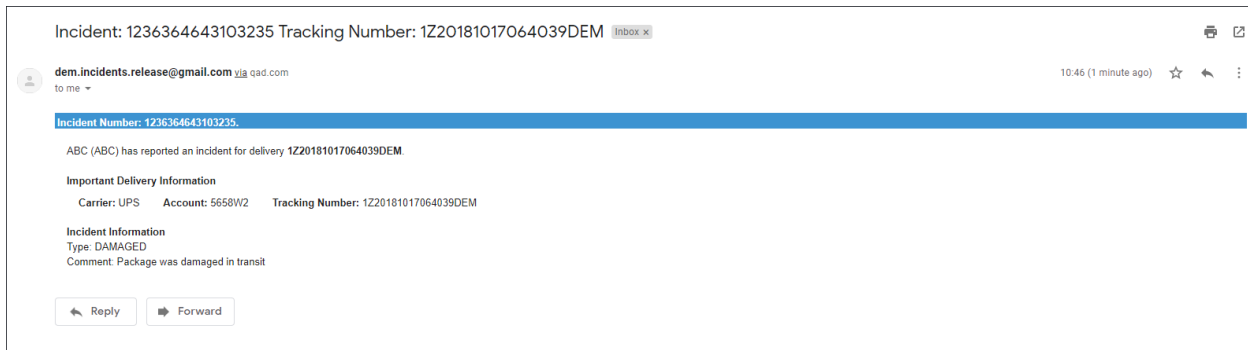
Fig. 27

New Incident Window

The subject of the New Incident e-mail contains both the Incident number and tracking number. The first line of the e-mail indicates who created the Incident. The body of the e-mail contains the carrier, account number, and tracking number of the Delivery. The body also contains the type and comment associated with the Incident.

Fig. 28

New Incident E-mail

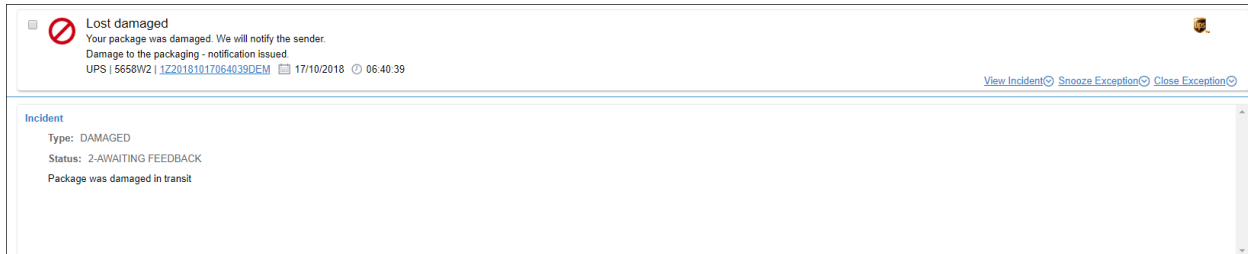


View Incident

When an Incident exists for an Exception, the option to View Incident replaces the New Incident option. Here you can view the type, status, and comment that were created for this incident.

Fig. 29

View Incident

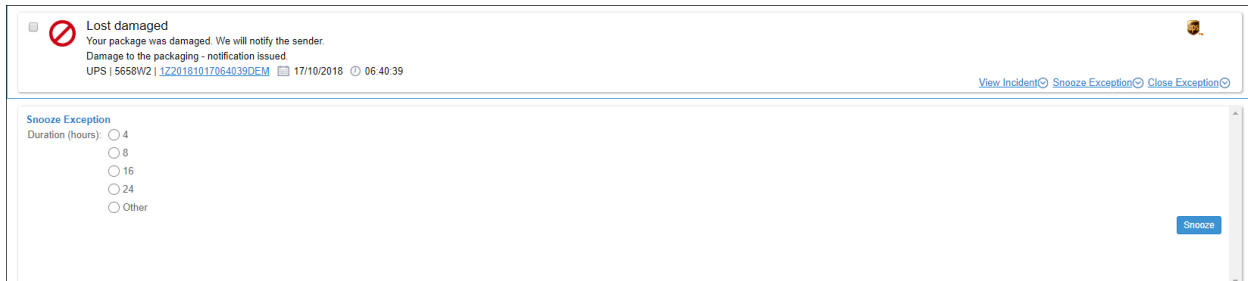


Snooze Exception

The second option to the bottom right of the Exception is the Snooze Exception option. You can choose to snooze an exception for up to 72 hours. You are given the option of choosing 4, 8, 16, 24, or Other. If you select Other, you can choose any number of hours between 1 and 72. When you snooze an exception, it is hidden from the Exceptions screen for the selected number of hours for all users. If the Exception is not closed in the intervening time period, then it will become visible once more in the Exceptions screen.

Fig. 30

Snooze Exceptions Options



Note All Exceptions, including snoozed Exceptions, can be viewed in the Exceptions window in the Delivery Sub-Option Menu. If you cannot see an Exception on the Exceptions page, you should check here. This window contains a Snooze Until column.

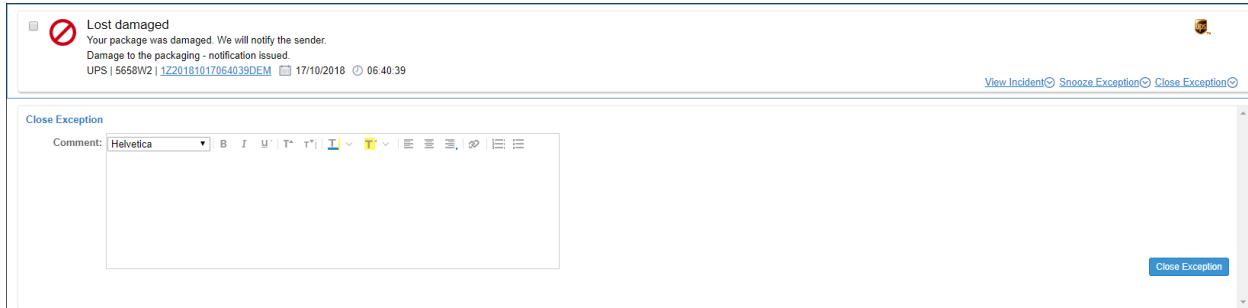


Close Exception

The final option to the bottom right of the exception is the option to Close Exception. When closing an exception, you must add a comment using the Comment field, and click the Close Exception button.

Fig. 31

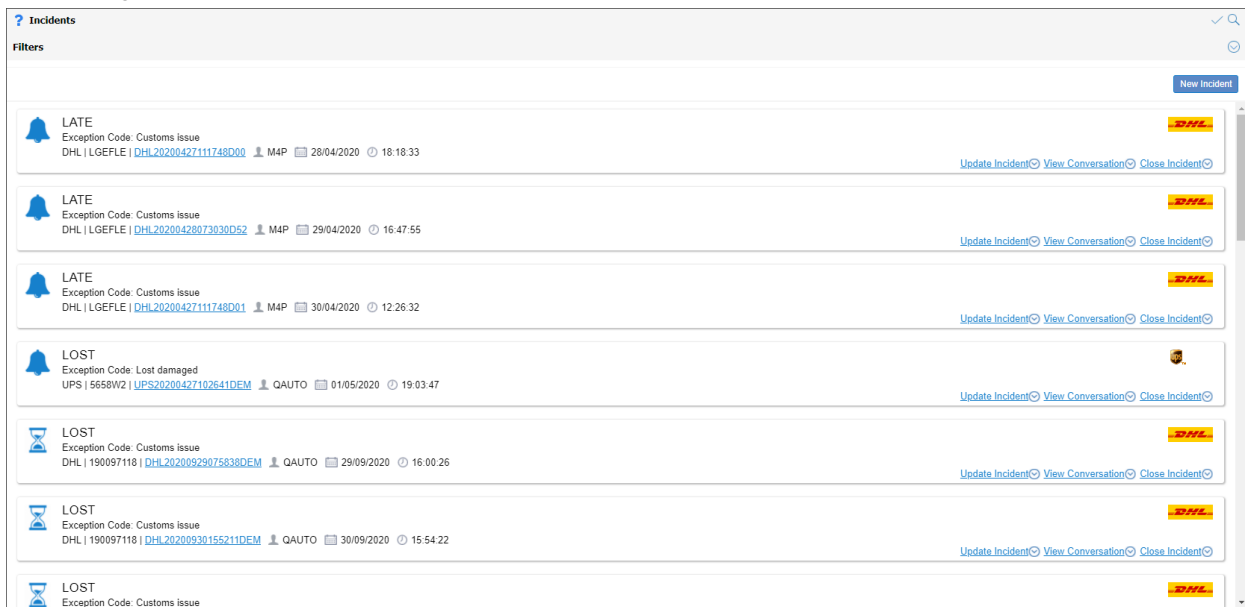
Close Exception Window



Incidents

Incidents allow you to communicate directly with the supplier in order to resolve issues. When you create an Incident, an e-mail is sent to the supplier containing the text of the Incident, and an Incident is recorded on the Incidents page. You can create an Incident related to an Exception from the Exceptions page. For more information, see [Exceptions - New Incident](#). You can also raise an Incident that is unrelated to an Exception from the Incidents page. All incidents can be viewed on the Incidents page.

Fig. 32
Incidents Page

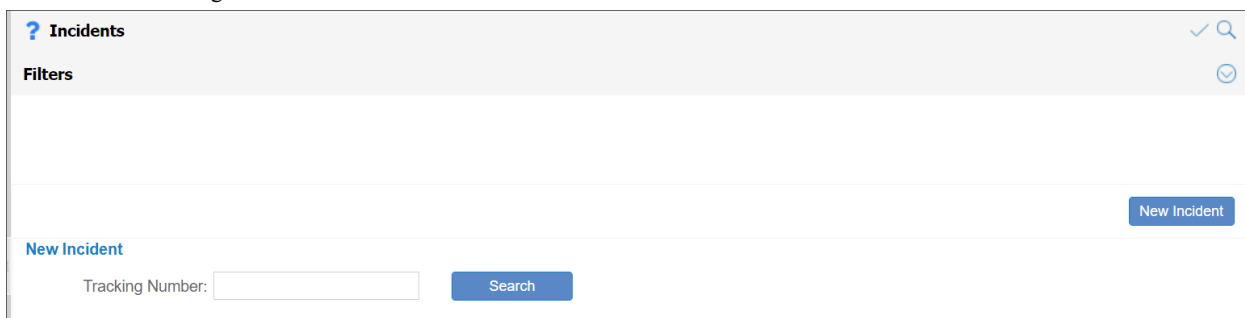


New Incident

To create a new incident, unrelated to an existing Exception:

1. Click the New Incident button at the top of the Incidents page.
2. Enter the Tracking Number related to the delivery in the available field.

Fig. 33
New Incident Tracking Number field



Click Search.



- There are two mandatory fields; Type and Comment. For more information on creating Incident Types, see the *Administration Guide*. There is also an optional Email field that allows you to send the details of the Incident to an e-mail address.

Fig. 34

New Incident

The screenshot shows the 'New Incident' form. At the top, there is a 'Filters' section. Below it, a 'New Incident' button is visible. The form contains the following fields and sections:

- Tracking Number:** A text input field containing 'DL20200929150000DEM05' and a 'Search' button.
- Email:** An empty text input field.
- Configuration User:** A message stating 'Configuration User - All Roles (QCONFIG) has reported an incident for delivery DHL20200929150000DEM05.'
- Important Delivery Information:** A section with 'Carrier: DHL', 'Account: 190097118', and 'Tracking Number: DHL20200929150000DEM05'.
- Incident Information:** A section with a 'Type' dropdown menu and a 'Comment' text area with a rich text editor toolbar.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

- Finally, click Save.

Fig. 35

An Incident



The screenshot shows an incident card with the following information:

- Icon:** A blue hourglass icon representing a timer.
- Incident Type:** 'DAMAGED'.
- Exception Code:** 'Exception Code: Delivery failed'.
- Supplier and Tracking:** 'UPS | 602836 | 1Z20180927105023DEM'.
- User:** 'ABC'.
- Date and Time:** '27/11/2018 16:45:23'.
- Actions:** 'Update Incident', 'View Conversation', and 'Close Incident' buttons.

Each individual Incident is headed by the incident type. Under this is the Exception code for the Delivery. On the bottom line of the Incident, the supplier, account number, and tracking number of the Delivery are displayed, along with the user who created the Incident, and the date and time that the incident was created. To the left of this information is an icon of either a bell or a timer.

Table 15

Incident Icons

Icon	Status	Explanation
	Review	This icon indicates that an update has been received from the supplier for this Incident, and that this update is pending review/action by the user.
	Awaiting Feedback	This icon indicates that the supplier has not yet responded to the user's most recent message posted to the Incident.

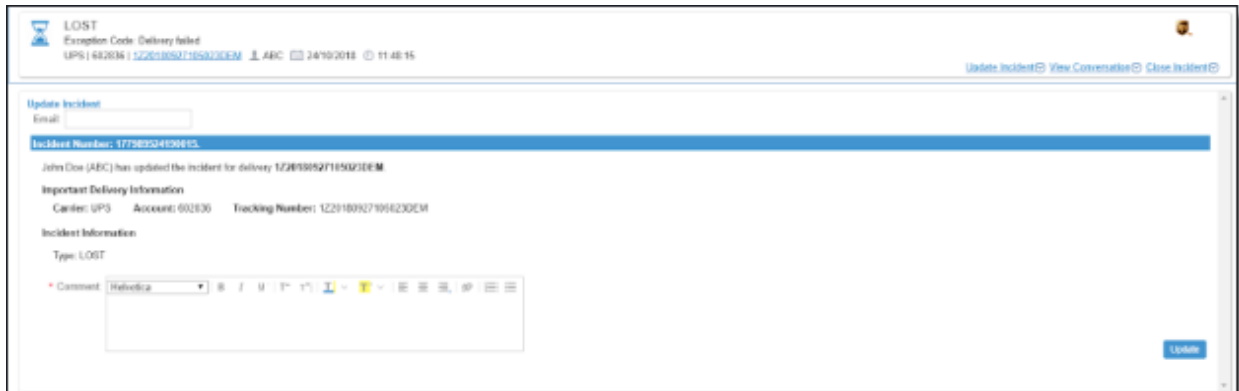
On the bottom right of the incident there are three options: Update Incident, View Conversation, and Close Incident.

Update Incident

To update an Incident, select the Update Incident option to open the Update Incident window.

Fig. 36

Update Incident



In the Update Incident window you can add a comment to the Incident. You can also add one or more e-mail addresses to whom the update can be sent. Finally, select the Update icon to save your update.



View Conversation

You can view all of the comments related to the Incident in the View Conversation window.

Fig. 37

View Conversation



Close Incident

When an Incident has been resolved, you can close it to remove it from your screen. To close an Incident, select the Close Incident option. You must add a comment and then click on the Close Incident button. All comments related to Incidents remain visible in the Comments window. All of your Incidents history can be viewed in the Incidents window. These windows are accessible through the Delivery Sub-Option Menu on the Deliveries page.

Fig. 38

Close Incident



Dashboards

Delivery Exception Management Dashboards are available for Operational Analytics customers. For more information see, Operational Analytics.



Status Update Entry

You can manually update the status of a delivery in the Status Update Entry page. The Status Update Entry page opens with the Status Update Entry form. Manually entered Status Update Entries appear as updates on the Tracking History for the delivery.

Fig. 39

Status Update Entry

The screenshot shows a web form titled "Status Update Entry". The form contains the following fields and controls:

- * Supplier:** A text input field with a search icon.
- * Tracking Number(s):** A text input field with a placeholder "Enter tracking numbers separated by a comma (,) or return (enter)".
- * Status Date:** A date input field showing "04/08/2019" with a calendar icon, and a time dropdown menu showing "10:09".
- * Status:** A text input field with a search icon.
- Description:** A large text area for entering a description.
- Country:** A text input field with a search icon.
- State Or Province:** A dropdown menu.
- City:** A text input field.
- Postal Code:** A text input field.
- Create Another:** A checkbox.
- Buttons:** "Save" and "Clear" buttons at the bottom left.

You must complete the Supplier, Tracking Number(s), Status Date, and Status fields to continue. There are optional Description, Country, State or Province, City, and Postal Code fields if you want to provide more information about the Status. You should check the Create Another box if you want to enter more than one update.

An error message will appear if:

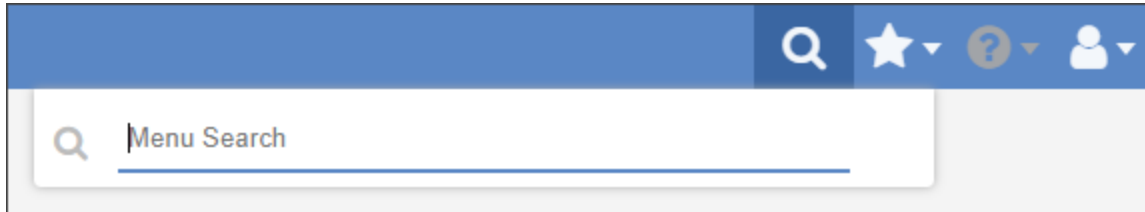
- An invalid supplier is entered.
- The delivery entered does not exist.
- The country entered does not exist.
- One or more of the tracking numbers entered is invalid.
- One or more of the deliveries entered are locked by another process.

Options

Users can access all pages in Delivery Exception Management using the Menu. Alternatively, users can use the Menu Search function from the QAD Precision Header.

Fig. 40

Menu Search



The Option Codes listed below are applicable to Delivery Exception Management Users. For Administrations codes, see *Administration Guide*.

Table 16

Option Codes related to Delivery Exception Management

Option Code	Page
DEM	DEM Deliveries Page
DEMEX	DEM Exceptions Page
DEMIN	DEM Incidents Page
DEMPH	DEM Tracking History Page
DEMSE	DEM Status Update History Page
DEMDH	DEM Dashboards Page