



QAD Adaptive Applications

User Guide

Delivery Exception Management

70-3396-20-Rev1
QAD GTTE v20
August 2022

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Change Summary

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

Date/Version	Description	Reference
August 2022 Rev1	Updated Contents	Page v
July 2022/DEM 20	Added Configuring Columns section to Getting Started chapter	Page 5-7
	Added Search Templates field details to Getting Started chapter	Page 7
	Updated Tracking History section.	Page 9-10
	Added new exceptions to table.	Page 13
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
	Delivery Sub-Options image updated.	Page 15
	Added Last Modified Date and Last Modified User fields to Table 4.	Page 11
March 2021 Rev3	Added information about Close Deliveries button.	Page 9
	Added new rows to Deliveries Page Column Headers table.	Page 10, Page 12
December 2020 Rev2	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 Rev1	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	--

Chapter 1

Getting Started

This section describes how to get started using QAD GTTE Delivery Exception Management (DEM).

Overview

Provides a summary of the functionality available in DEM.

Menu

Describes the main menu, which appears to the left of the screen.

Message Area

Describes how to use the Message Area panel at the bottom of the screen.

Menu Search and Options

Describes the Web UI menu search.

Configuring Columns

Describes how to work with the columns in various grids across the Web UI.

Search Templates

Describes how to use the search template functionality.



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
- Dashboards

Fig. 1.1
Delivery Exception Management Menu

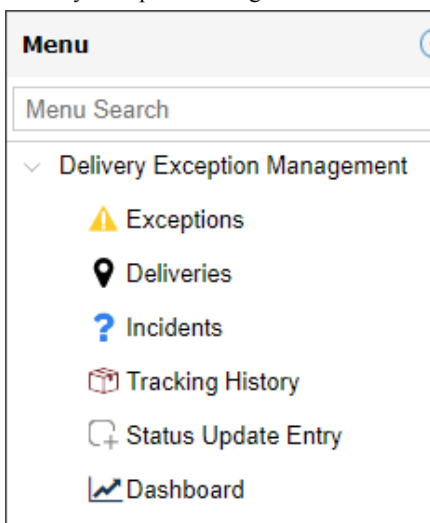



Table 1.1
Explanation of DEM Concepts

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.

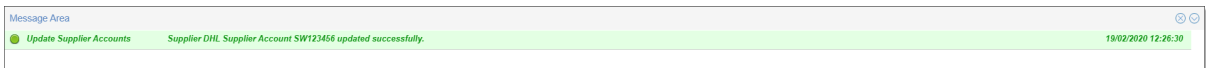
Message Area

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 *Clear*  button at the top right of the panel.

To hide the Message Area, click the *Collapse*  button at the top right of the panel.

Fig. 1.2
Message Area

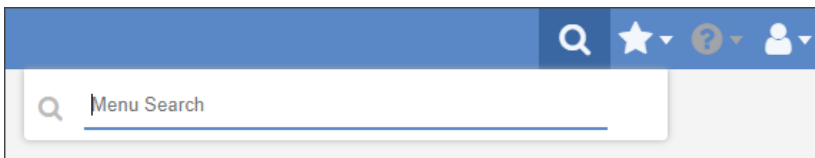


Menu Search and Options

You can access all pages in DEM using the menu on the left. Alternatively, you can use the menu search feature located in the top horizontal menu. Enter a specific page title or option code in the search field and press *Enter*. Alternatively, click the search icon.

The menu search compares search text with all menu options related to your roles, and to other available options specified by your administrator.

Fig. 1.3
Menu Search



The option codes listed below apply to DEM users and enable you to navigate to the relevant pages. For administrator codes, see the *Delivery Exception Management Administration Guide*.

Table 1.2
DEM Option Codes

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



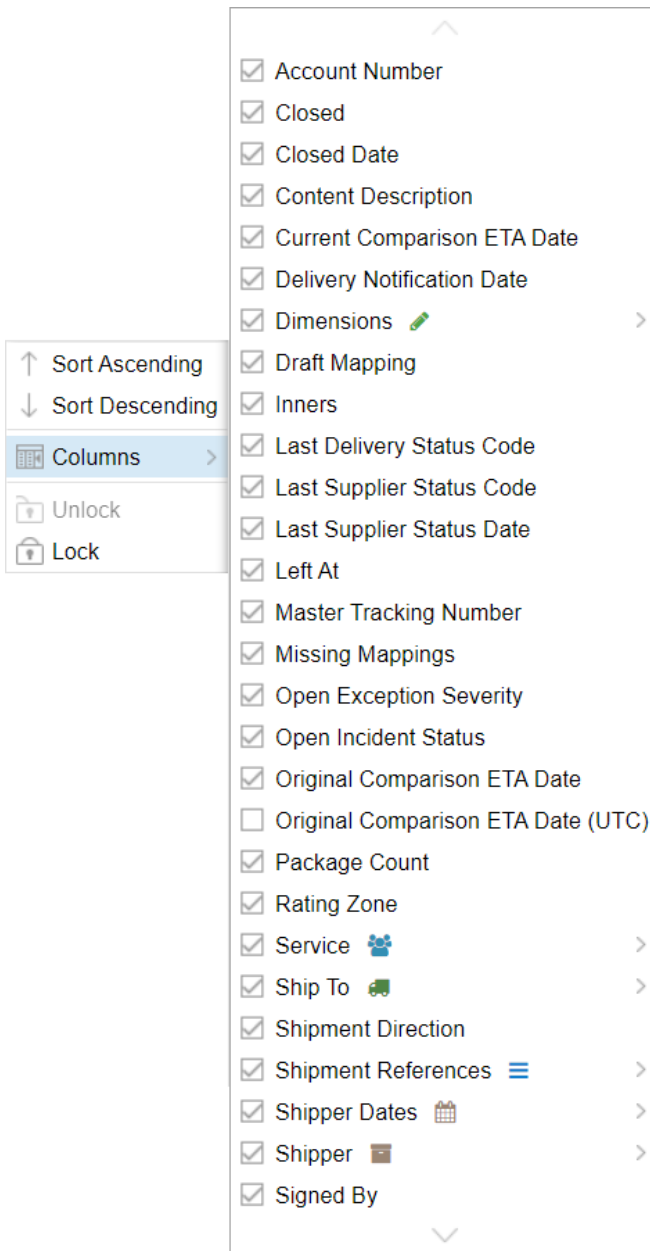
Configuring Columns

You can configure the columns that are visible in the grids on various pages, move them, and lock them in place so that they are always visible.

Showing and Hiding Columns

To show or hide a particular column, click the drop-down arrow on any column. Roll over *Columns* to view the complete list of available columns. Select or deselect the box beside any column name to show or hide it in the grid.

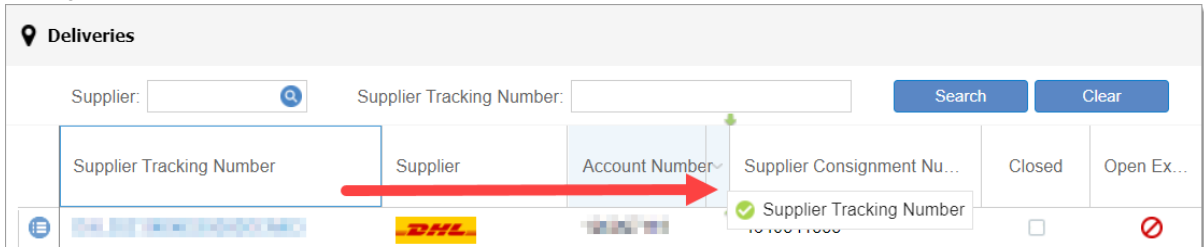
Fig. 1.4
Selecting and Deselecting Columns, Deliveries Page



Moving Columns

To move a grid column, click and drag the column to the new location, which is indicated by green arrows. Release the cursor to complete the column move.

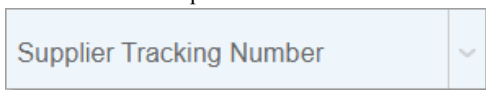
Fig. 1.5
Moving a Column



Locking Columns

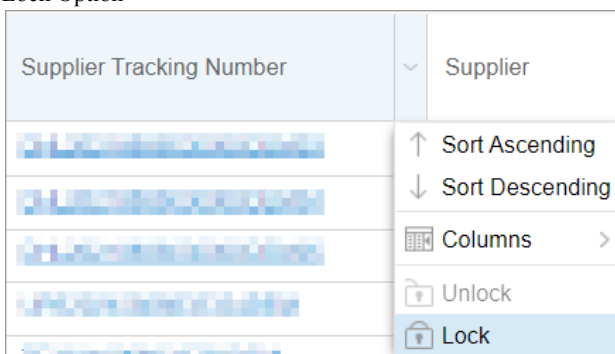
You can use the *Lock* option to fix one or more columns in position on the left of the grid, in an area that does not offer the horizontal scrolling capability. This facility is useful when you want certain columns to remain visible while you scroll horizontally through the grid. To include a column in this locked area, hold the cursor over the column heading to display a chevron.

Fig. 1.6
Click Chevron to Open Column Menu



Click the chevron and then click *Lock*.

Fig. 1.7
Lock Option



You can lock multiple columns; each newly locked column is appended to the locked area.

To remove a column from the locked area, hold the cursor over the column heading to display a chevron. Click the chevron, and then click *Unlock*; the column moves to the first column position to the right of the locked area.

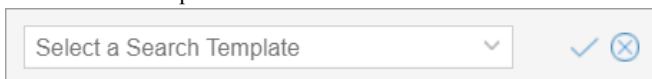
Fig. 1.8
Grid with Locked Supplier Tracking Number Column

Supplier Tracking Number	Supplier	Account Number	Supplier Consignment Nu...	Closed	Open Ex...	Ope...	Closed Date	Last Supplier Status Dat
				<input type="checkbox"/>	<input checked="" type="checkbox"/>		09/08/2021 03:17:0	
				<input type="checkbox"/>	<input checked="" type="checkbox"/>		09/08/2021 03:17:0	
				<input type="checkbox"/>	<input checked="" type="checkbox"/>		09/08/2021 03:17:0	
				<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/08/2021 03:23:3	
				<input checked="" type="checkbox"/>			29/03/2022 18:30:21	06/08/2021 03:27:3

Search Templates

On several pages, a *Select Search Template* field is visible in the search panel above the grid. This allows you to select a search template that you previously saved. Search templates store grid filter criteria, as well as search criteria.

Fig. 1.9
Select Search Template Field



To apply a saved search template, click the drop-down arrow beside the *Select a Search Template* field and select an option from the list.

To save your current search criteria and grid configuration, click the *Save* button beside the *Select a Search Template* field.

To delete a saved search template, click the drop-down arrow beside the *Select a Search Template* field, select an option from the list, and click the *Delete* button.

Note Saved templates are user-specific. It is not currently possible to define global templates that are available to all users in the system.

Chapter 2

Tracking History

This section describes how to use the tracking history functionality.

Overview

Provides an overview of the Tracking History menu option.

Searching for Tracking History

Describes how to locate the tracking history for a delivery.

Tracking History Results

Describes how to interpret the tracking history results and perform actions on them.



Overview

You can track the progress of a delivery by selecting the *Tracking History* page from the menu. The same information is also accessible on various pages throughout the UI by clicking the hyperlink in the *Supplier Tracking Number* column; for example, on the *Deliveries* page.

Searching for Tracking History

Using the *Search By* fields in the search panel, you can locate the tracking history for a specific delivery by tracking number or reference. If *Reference* is selected, the *Type* field becomes available, enabling you to filter by:

- All
- Customer Reference
- Customs Reference
- Order Number
- Other Reference
- PO Reference

Note The available filters can vary depending on how your administrator has configured QAD GTTE.

To search for a consignment of packages, select the *Reference* field in the search panel, enter the supplier consignment number in the search box, and click *Search*.

Fig. 2.1

Search Panel, Tracking History Page

Tracking History Results

After you complete the relevant search panel fields and click *Search*, the *Tracking History* page is populated with up-to-date information about the delivery’s progress so far.

Fig. 2.2
Tracking History Results for a Single Delivery

In the case of multiple search results, you can select a single record in the upper panel to view the corresponding tracking information in the lower panel.

Fig. 2.3
Tracking History with Multiple Search Results

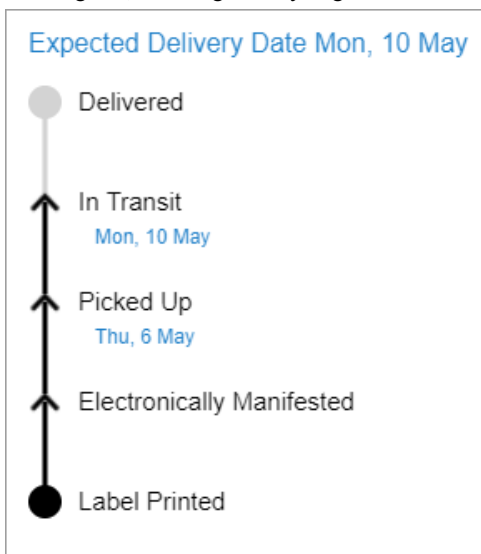


Tracking Bar

The tracking bar on the left illustrates the progress of the delivery, from origin to destination. The status arrows are displayed in colors that indicate a particular status:

- Green: Delivered and closed.
- Blue: Undelivered and open. Expecting additional status updates from the carrier.
- Grey: Incomplete.
- Black: Closed and assumed to be delivered.

Fig. 2.4
Tracking Bar, Tracking History Page



The tracking bar allows you to track the current status of a delivery through the following stages:

Table 2.1
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.



Tracking Timeline

The area on the right of the page provides a tracking history timeline. It contains status information for each location that it is provided, as well as a longer description of the status when available.

Note The most up-to-date information about the delivery appears at the top of the page.

Fig. 2.5
Tracking History Timeline



The status codes that appear in the tracking history timeline are described in the table below.

Table 2.2
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.
Unresolved	The delivery is currently assigned a Missed Delivery Date exception but there have been no updates for an extended time. The default unresolved duration threshold is 21 days. Note The unresolved threshold is configurable by your administrator. See the DEM Administration Guide for more information.
Zero Activity	The delivery is set to No Activity but has not moved (is not yet in transit). This identifies problems that may be related to the supplier not taking custody of the goods, or a process issue regarding how canceled shipments are communicated to the carriers.

Delivery Overview Panels

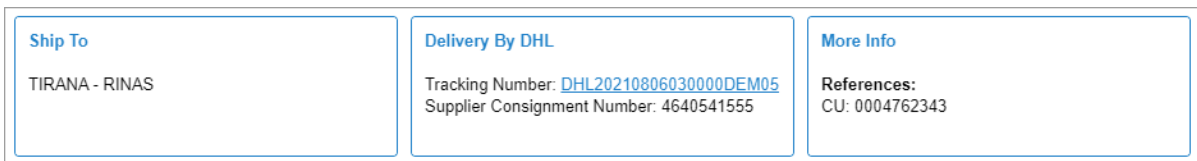
The bottom of the page contains three panels that provide an overview of the delivery details:

Ship To. 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 additional information about the delivery.

Fig. 2.6
Delivery Detail Panels, Tracking History Page



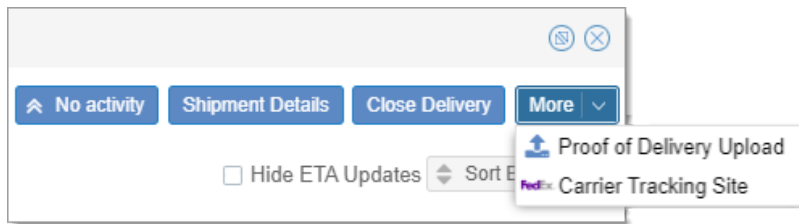
Action Buttons

At the top of the *Tracking History* area on the right is a series of buttons that enable you to view extra information about the delivery and perform various actions.



Fig. 2.7

Action Buttons, Tracking History Window



Exception

If an exception is raised against the delivery, a button indicating its severity is the first in the line of action buttons; for example, in the image above, the exception is *No Activity*. Clicking this button directs you to the relevant *Exceptions* record for this delivery. For more information about exceptions, see the *Exceptions* section.

Awaiting Feedback

The *Awaiting Feedback* button indicates that an incident has been raised against this delivery. Click the button to view the incident on the *Incidents* page. For more information, see the *Incidents* section.

Shipment Details

The *Shipment Details* button is displayed for all deliveries that have shipment transaction information available. Click this button to navigate to the relevant *View Shipment Transaction* page.

Close Delivery

Click the *Close Delivery* button to mark the selected delivery as Closed.

Comments

For deliveries with comments, a *Comments* button is displayed that, when clicked, displays the *Comments* window. For more information, see the *Comments* section.

Proof of Delivery Upload

Click the *Proof of Delivery Upload* button to upload a proof of delivery file for the selected delivery. Accepted file types include GIF, JPEG, PNG, and PDF. You can also view previously uploaded Proof of Delivery files by clicking this button.

Carrier Tracking Site

The *Carrier Tracking Site* button is an external link that directs you to the carrier's tracking page with the inputted supplier tracking number.

Perform Evaluation

If the evaluation for a delivery is pending, the *Perform Evaluation* button is displayed on the *Tracking History* page. Click this button to manually perform the evaluation for this delivery.



Chapter 3

Deliveries

This section describes the functionality available from the Deliveries page.

Overview

Provides an overview of the Deliveries page.

Searching for Deliveries

Describes how to locate a delivery in the system.

Deliveries Columns

Describes the columns that are available on the Deliveries page.

Delivery Sub-Menu

Describes the options available in the sub-menu of each delivery record.



Deliveries Columns

The available columns and their descriptions are detailed in the table below.

Table 3.1
Deliveries Page Column Headers

Column Header	Description
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 <i>Tracking History</i> page.
Closed	If the box in this column is checked, the delivery is closed and will no longer be updated.
Consignor	If populated, this can link to the shipment inquiry from the <i>Tracking History</i> 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	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 <i>Supplier Current ETA Date</i> field if available. If the <i>Supplier Current ETA Date</i> field is not completed, the value is taken from the <i>Original Comparison ETA Date</i> value.
Delivery Id	The unique identifier for a delivery transaction.
Despatch	The despatch number received from the TMS application.
Despatch Date	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 indicates whether there are incomplete code conversions for the delivery. It is set to <i>true</i> when the code conversion process fails during the creation of a delivery history record. For more information on code conversions, see the <i>Code Conversions In</i> section of the <i>Delivery Exception Management Administration Guide</i> .
Enabled	If enabled, this means that the delivery is enabled for processing. This can be configured by your administrator. For more information, see the <i>Supplier Accounts</i> section of the <i>Delivery Exception Management Administration Guide</i> .

Evaluation Pending	If enabled, this column indicates that more delivery information may be available, but the background job that completes some fields has not yet processed. For more information on background jobs, see the <i>Delivery Exception Management Administration Guide</i> .
Hold at Location Date	If the delivery is to a supplier's hub, 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 <i>Job Queue</i> window. Administrators can view information about the job queue related to this delivery.
Job Queue Process	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 may have been converted from a supplier status code. This information can be derived from either the supplier or the system.
Last Modified Date	The date of the latest update to the delivery.
Last Modified User	The user that last updated information about the delivery.
Last Status ID	A database sequence that is the unique identifier for a delivery history record. For more information, see <i>Delivery History</i> . 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 on which the last supplier code was received from the supplier.
Left At	The location where the supplier left the delivery.
Master Tracking Number	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 are 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	Indicates whether an exception is raised against the delivery. Roll over the icon to see the severity level for the exception.
Open Incident Status	Indicates whether an incident is raised against the exception. Roll over the icon to see the status of the incident.
Original Comparison ETA Date	The system-calculated ETA date that is used by DEM when checking for an original expected ETA date. This is taken from the <i>Supplier Original ETA Date</i> value, if this field is completed. If the <i>Supplier Original ETA Date</i> field is blank, the value is taken from the <i>Shipper ETA Date</i> .
Original Dimensional UOM	The original dimension unit of measurement provided by the supplier.
Original Service	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	The box in this column is checked if polling is required for deliveries from this carrier.
Rating Zone	The supplier rating zone for this delivery.
Reference 1	Administrators can configure the required information for this field on the <i>Admin Settings</i> page. Possible values include; Shipment Order number, End of Day Batch number, and Customer Reference number. For more information, see the <i>Delivery Exception Management Administration Guide</i> .
Reference 2	Administrators can configure the required information for this field on the <i>Admin Settings</i> page. Possible values include; Shipment Order number, End of Day Batch number, and Customer Reference number. For more information, see the <i>Delivery Exception Management Administration Guide</i> .
Reference 3	Administrators can configure the required information for this field on the <i>Admin Settings</i> page. Possible values include; Shipment Order number, End of Day Batch number, and Customer Reference number. For more information, see the <i>Delivery Exception Management Administration Guide</i> .
Service	The standardized code for the supplier product or service of the delivery and may have been converted from a carrier service code.
Service Description	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	The estimated time of arrival for the Delivery, as determined by the shipper.
Shipper Promise Date From	The earliest date of delivery guaranteed by the shipper to the recipient.
Shipper Promise Date To	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	Identifies the source system from which the delivery was created. It is usually the identifier of a TMS application.
Supplier	The logo of the carrier company that is carrying out the delivery.
Supplier Consignment Number	A number that identifies the consignment that a delivery is a part of.
Supplier Current ETA Date	The current estimated delivery date according to the supplier.
Supplier Delivery Date	The date on which the supplier delivered the package to the end destination of the delivery.
Supplier Manifested Date	The date on which 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	The original estimated delivery date provided by the supplier.



Supplier Pickup Date	The date on which the supplier picked up the delivery from the shipper.
Supplier Tracking Barcode	The barcode of the delivery that the supplier uses to maintain tracking information.
Supplier Tracking Number	The tracking number of the delivery that the supplier uses to maintain tracking information. This is a hyperlink that, when clicked, displays the <i>Tracking History</i> window. Note The same information in this window is also accessible on the <i>Tracking History</i> page.
Weight UOM	The unit of measurement applicable to the weight fields on the delivery. This may have been converted from a supplier UOM code.

Closing Deliveries

A closed delivery is a delivery that is no longer updated after it is marked as Closed.

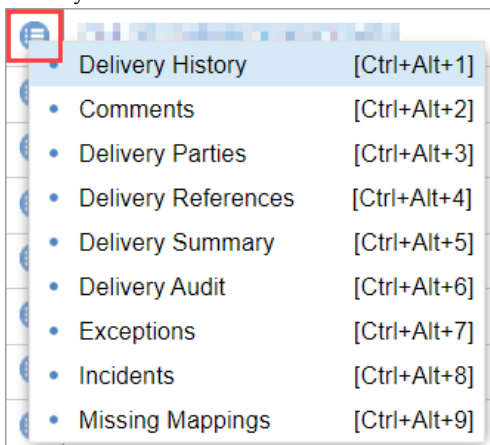
To close a delivery, select a delivery record—or multiple records—in the grid and click the *Close Deliveries* button.

Closed deliveries remain in the grid on the *Deliveries* page until they are archived and are indicated with a checkmark in the *Closed* column.

Delivery Sub-Menu

To the left of each delivery is a sub-menu button.

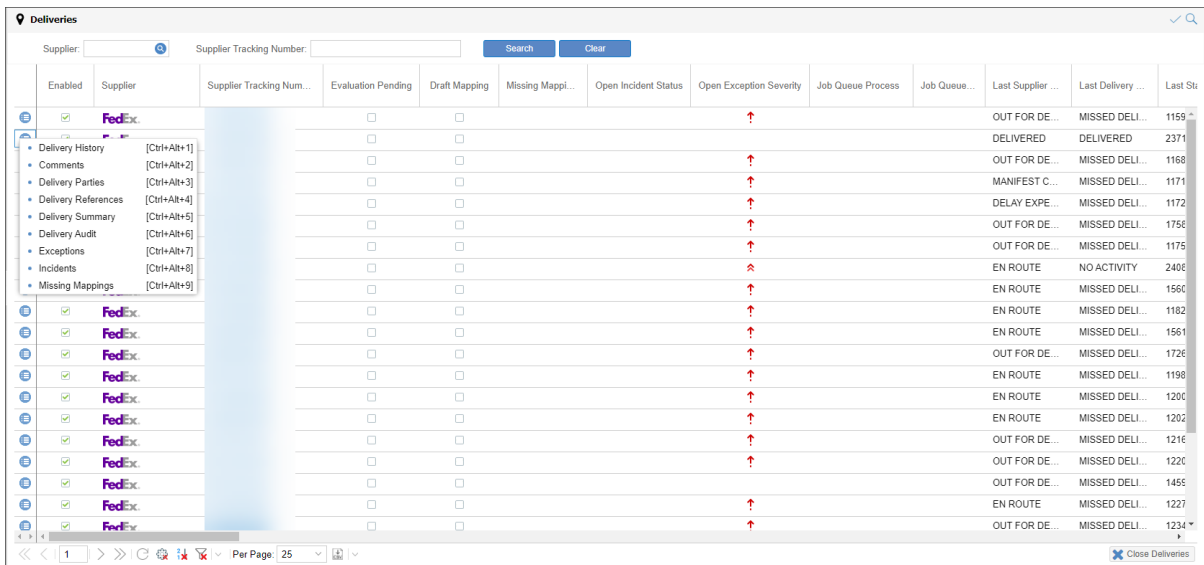
Fig. 3.4
Delivery Sub-menu



Click it to add or view details about a delivery under the following options:

- Delivery History
- Comments
- Delivery Parties
- Delivery References
- Delivery Summary
- Delivery Audit
- Exceptions
- Incidents
- Missing Mappings

Fig. 3.5
Delivery Sub-Menu

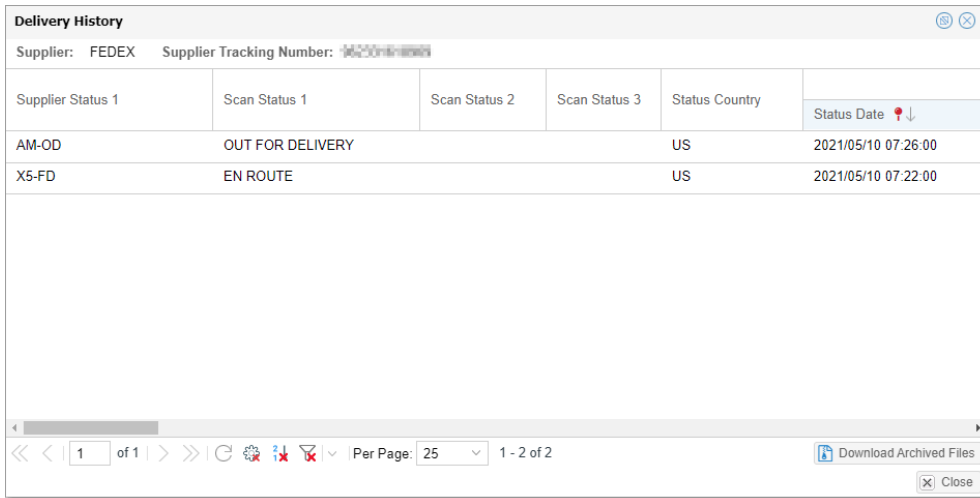


Delivery History

The *Delivery History* window displays a list of status updates that are received from an external source, such as the supplier or TMS application. The data shows the status update codes received from the external source, as well as the internal status codes that were determined by DEM's code conversion process.



Fig. 3.6
Delivery History Window



This grid is useful for viewing the low-level delivery data that is received from the supplier.

Note This information is read-only and cannot be modified in the UI.


The statuses are listed in descending order, with the most recent events or problems appearing at the top of the grid. Each grid column is described in the table below.

Table 3.2
Delivery History Columns

Column Header	Description	
Address Line 1,2	The address of the status location.	
Created Date	The date on which the delivery history record was created.	
Created User	The user that created the delivery history record. Records created by interfaces display SYSTEM in this column. For records that are created by manual tracking status entry, the specified user is the logged-in user.	
Evaluation Applied	A checked box in this column indicates that evaluation was carried out.	
Evaluation Pending	A checked box in this column indicates that evaluation is still pending.	
Event Details	Status Date	The date—supplied by the supplier—on which the activity occurred.
Event Details	Notification Date	The date on which the user was notified of the activity.
Event Details	Time Zone ID	Specifies the time zone that is used in the <i>Event Details</i> fields.
Extract	An ID number that references the corresponding extract. You can use this ID number to view extract information on the <i>Extracts</i> page.	
File Name	The name of the file from which the delivery history record was created, if the source of the data was an interface file.	
Name	The status location name.	
Notification Date	This field is not currently in use by DEM.	



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

Note It is also possible to download all of the carrier update files for the selected delivery using the *Download Archived Files*  button. This feature is intended for support purposes. Please note that files are deleted after a certain period of time. When a file is removed, it cannot be downloaded using this feature.

Comments

The *Comments* window allows you to view all comments that have been added against a delivery and add new ones. When an incident is created, the email that is sent to the carrier is stored as a comment.

Fig. 3.7
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

The columns in this window are described in the table below.

Table 3.3
Comments Window Column Headers

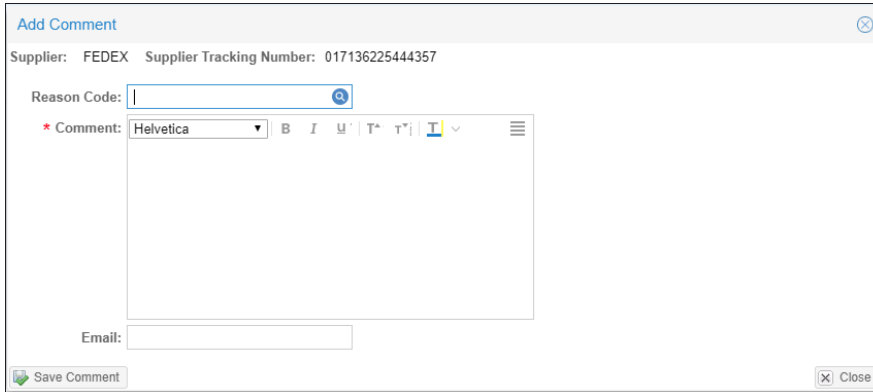
Column Header	Description
Comment	The comment text. You can view the full text by rolling over the comment.
Created User	The user who created the comment, or the incident that resulted in this comment being created.
Created Date	The date on which the comment was created.
Reason Code	Shorthand codes for frequently used comments.
Source	The source of the comment. Possible values are Incident or User.
E-mail	The email address or addresses that the comment was sent to.



To add a comment:

1. Click the *Add Comment*  button.

Fig. 3.8
Add Comment Window



2. In the *Add Comment* window, manually write a comment in the *Comment* field, or select a shorthand code using the *Reason Code* lookup field. The available reason codes are described in the table below.

Table 3.4
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.

Note To create your own reason codes for use with DEM, see the *Delivery Exception Management Administration Guide*.

3. Add an optional recipient email address for the comment notification in the *Email* field.
4. Click *Save Comment*.

Delivery Parties

In the *Delivery Parties* window, you can view all of the parties related to the delivery. This typically includes the shipper and recipient, but may also include other parties, such as the billing party.

Fig. 3.9
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

The columns in this window are described in the table below.

Table 3.5
Delivery Parties Column Headers

Column Header	Description
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 in which the delivery party is located.
Contact Name	The name of the person to be contacted about this delivery party.
Country	The country in which the delivery party is located.
Created Date	The date on which the delivery party was created.
Created User	The user who created the delivery party.
Email	The contact email 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 where the delivery party is located.



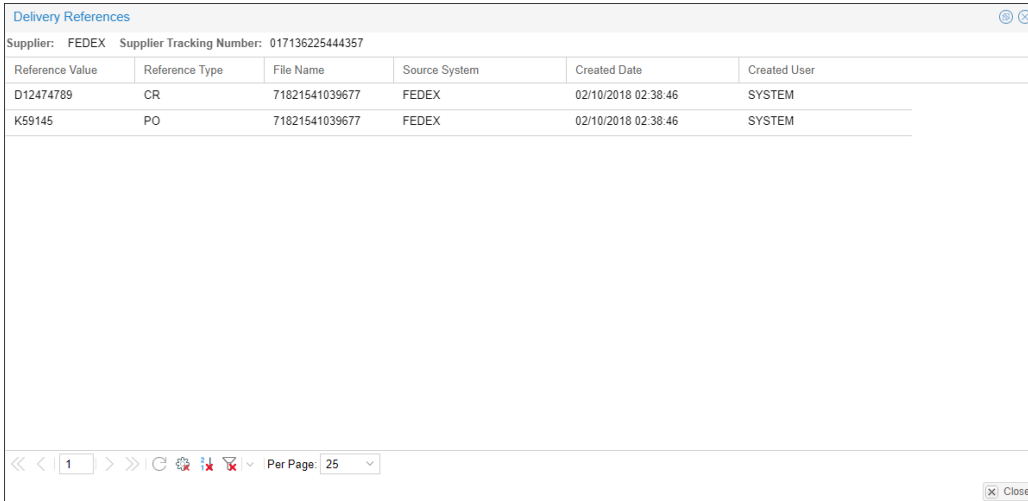
State or Province	The state or province in which the delivery party is located.
-------------------	---

Delivery References

The *Delivery References* window contains information about delivery references, including the source system and file, where applicable.

Fig. 3.10

Delivery References Window



The columns in this window are described in the table below.

Table 3.6

Delivery Reference Columns

Column Header	Description
Created Date	The date on which the delivery reference was created.
Created User	The user who created the delivery reference. This is always set to a value of SYSTEM.
File Name	If applicable, this is the name of the interface file that was the data source for the delivery reference record.
Source System	The source system from which the delivery reference record originated. This can be the supplier code or TMS. An example of a supplier code is UPS. An example of a TMS is QAD GTTE.
Reference Type	The type of reference that is stored in the delivery reference record. These can be qualifier values from a supplier’s tracking status file.
Reference Value	The value of the reference stored in the delivery reference record.



Delivery Summary

The *Delivery Summary* window provides a summary of delivery details. It includes the most useful information from all of the delivery sub-menu options.

Fig. 3.11

Delivery Summary Window

The screenshot shows a window titled "Delivery Summary" with a blue header bar containing "FEDEX" and "017136225444357" followed by a status "Af". Below the header, the window is divided into two main sections. The left section lists key dates: "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", and "Comparison ETA: Fri, 20 Jul, 00:00". Below this is a "More Info" section with "References: D12474789, K59145", "Billable Weight: 2 L", and "Actual Weight: 2 L". The right section contains three panels: "Ship From" (DEM Warehouse, 742 Main Street, JONESTOWN, PA, U, 12347833S), "Ship To" (TEAM OF US, 123 High Street, JACKSONVILLE, FL, US, 123460000), and "Service" (019). A "Close" button is located in the bottom right corner.

The blue bar at the top of the window contains the supplier, tracking number, and delivery status.

The dates listed below the blue bar 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.

In the *More Info* area, this miscellaneous information can include the master tracking number, references, dimensions, and weight.

The panels to the right of the window contain *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.

Delivery Audit

In the *Delivery Audit* window you can view the status of the background jobs that have been performed for the delivery. For more information on background jobs, see the *Delivery Exception Management Administration Guide*.

Fig. 3.12

Delivery Audit Window

The screenshot shows a window titled "Delivery Audit" with a header bar containing "Supplier: UPS" and "Supplier Tracking Number: UPS20190610143215DEM". Below the header is a table with the following data:

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		

At the bottom of the window, there is a navigation bar with a page number "1", a "Per Page: 25" dropdown, and a "Close" button.

The columns in this window are described in the table below.

Table 3.7

Delivery Audit Columns

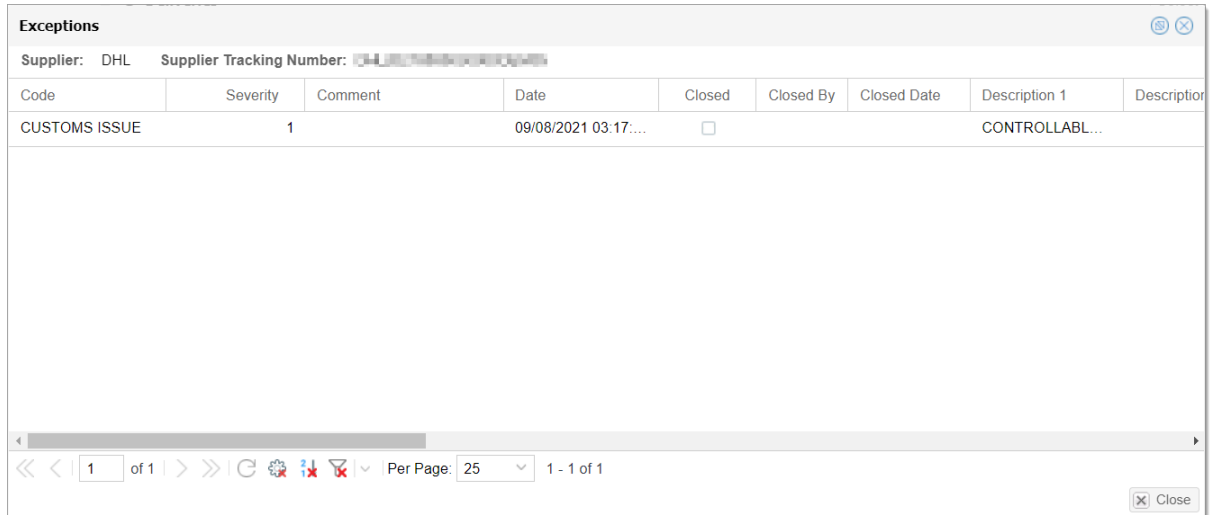
Column Header	Description
Description	A description of the function of the background job performed.
Elapsed Time	The duration of the background job.
End	The time at which the background job was completed.
Job Code	The code associated with the background job.
Job Name	The name of the background job.
Start	The time at which the background job began.
User	The user who initiated the job.

Exceptions

The *Exceptions* window displays summary information about all exceptions associated with the delivery. For more information on exceptions, see the *Exceptions* section.

Fig. 3.13

Exceptions Window



The columns in this window are described in the table below.

Table 3.8

Exceptions Columns

Column Header	Description
Account	The supplier account number associated with the delivery.
Closed	If checked, this indicates that an exception is resolved or closed. If the exception is open, the box is unchecked.
Closed By	The user who closed the exception.
Closed Date	The date on which the exception was closed.
Code	The internal code associated with the exception.
Comment	The comment added by the user when the exception was closed. If the exception is open, this field is blank.
Created Date	The date that the exception was created.
Created User	The user who created the exception.
Exception Date	The date that an exception occurred, according to information communicated by the supplier.
Description 1	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.

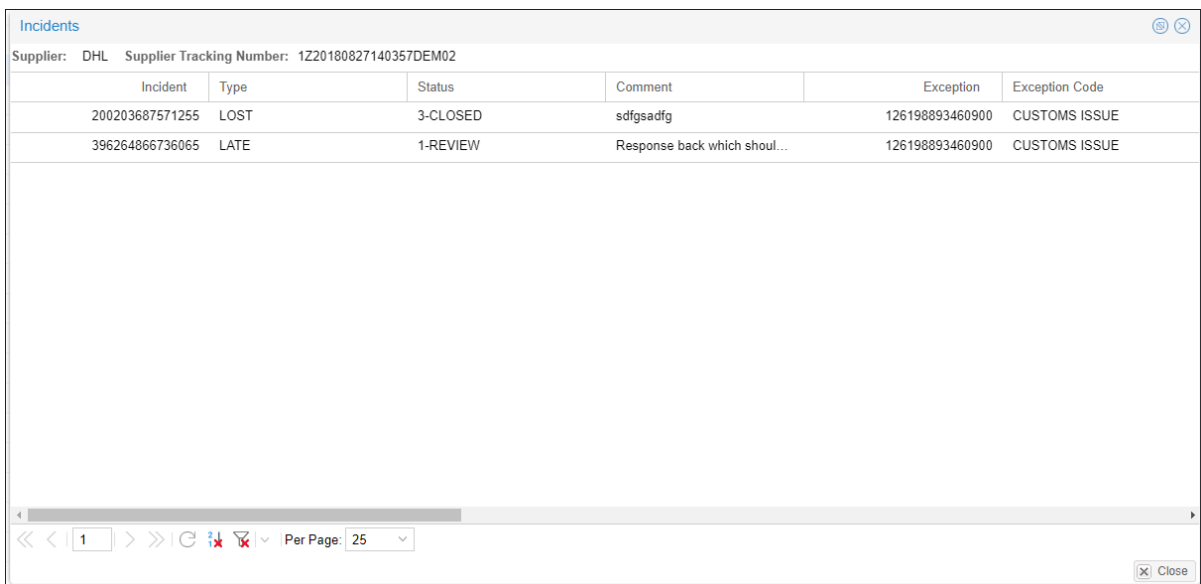


Severity	The severity level of the exception: <ul style="list-style-type: none"> • 1 is high severity • 2 is medium severity • 3 is low severity
Snoozed Until	If it is currently snoozed, this is the date/time on which the exception will be re-displayed on the <i>Exception</i> page. This date/time is 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

The *Incidents* window displays summary information about all incidents associated with the delivery. For more information on incidents, see the main *Incidents* section.

Fig. 3.14
Incidents Window



The columns in this window are described in the table below.

Table 3.9
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 unchecked.
Closed By	The user who closed the incident.
Closed Date	The date on which the incident was closed.
Comment	The comment added to the incident by the user.



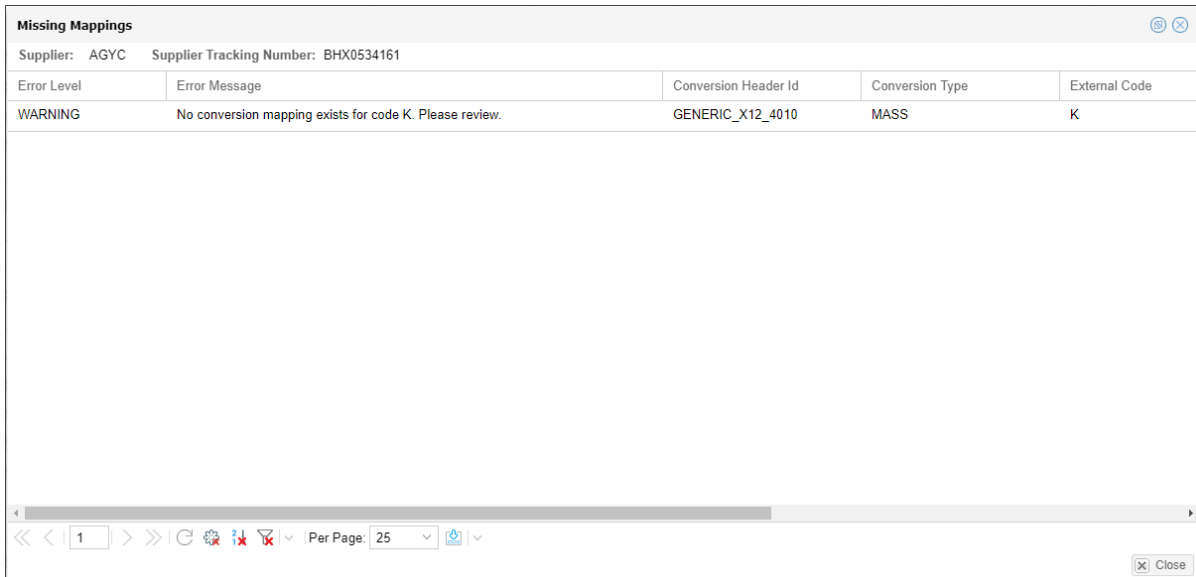
Created Date	The date on which the incident was created.
Created User	The user who created the incident.
Exception	The unique ID of the exception that this incident was raised against.
Exception Code	The code of the exception that this incident was raised against.
Incident	The unique ID of the incident.
Raised By	The user who raised the incident.
Raised Date	The date on which the incident was raised.
Status	<p>The status of the incident:</p> <ul style="list-style-type: none"> • Review: The incident has been updated by the supplier and is currently awaiting a response from the user. • Awaiting Feedback: 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 are added by QAD GTTE, if applicable, in the future.</p>



Missing Mappings

In the *Missing Mappings* window, users can view conversion issues that are 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. 3.15
Missing Mappings Window



The columns in this window are described in the table below.

Table 3.10
Missing Mappings Column Headers

Column Header	Description
Conversion Header Id	The conversion code.
Conversion Type	The type of code mappings.
Created Date	The date on which the incident was created.
Created User	The user who created the incident.
Delivery Id	The delivery code.
Error Level	This value can be ERROR or WARNING. Only ERROR entries are included in the mappings page.
Error Message	The type of issue that occurred.
External Code	The code that the system could not map to an internal code.



Chapter 4

Exceptions

This section describes the functionality available from the Exceptions page.

Overview

Provides an overview of exceptions.

Exception Severity

Describes the severity levels of exceptions.

Working With Exceptions

Describes the various actions that you can perform on exception records.



Overview

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

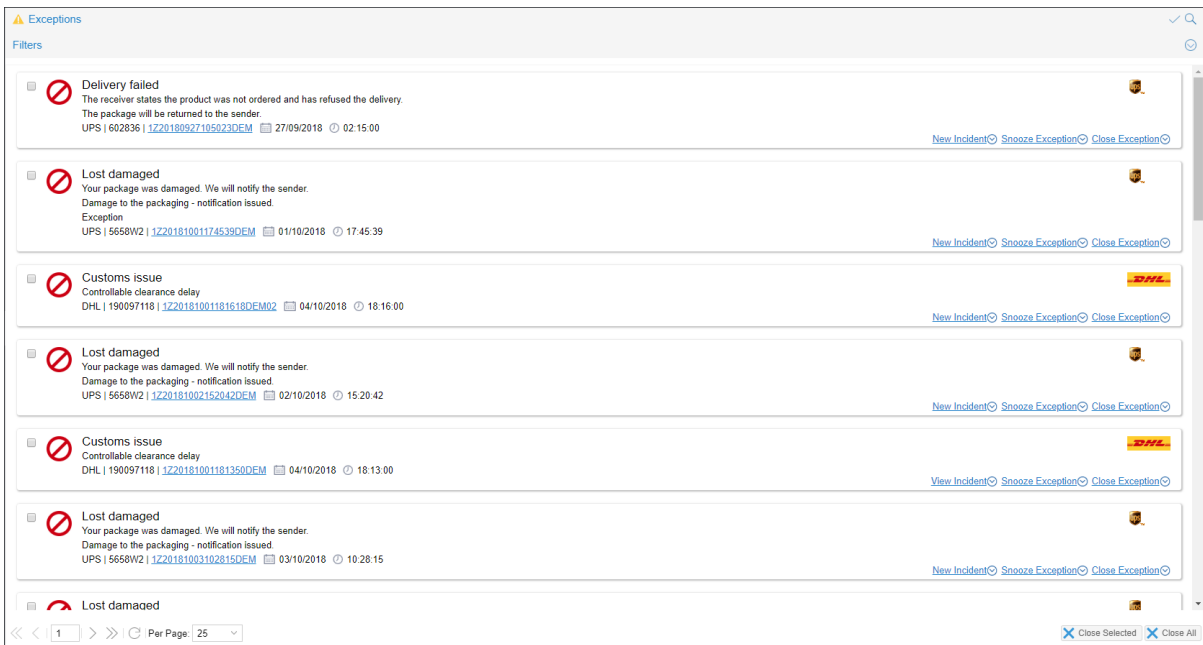
Note There can only be one open exception against a delivery at any given time.

Exceptions are automatically closed if:

- A new exception arises against a delivery, replacing and closing the previously existing one.
- The carrier indicates that the delivery has been delivered.

Exceptions can also be closed manually by the user.

Fig. 4.1
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 *Delivery Exception Management Administration Guide*.

There are three severity levels. In the grid on the *Exceptions* page, the severity is indicated by an icon to the left of each record. Each one is described in the table below.

Table 4.1
Exception Severity Levels

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

Working With Exceptions

Each exception record contains:

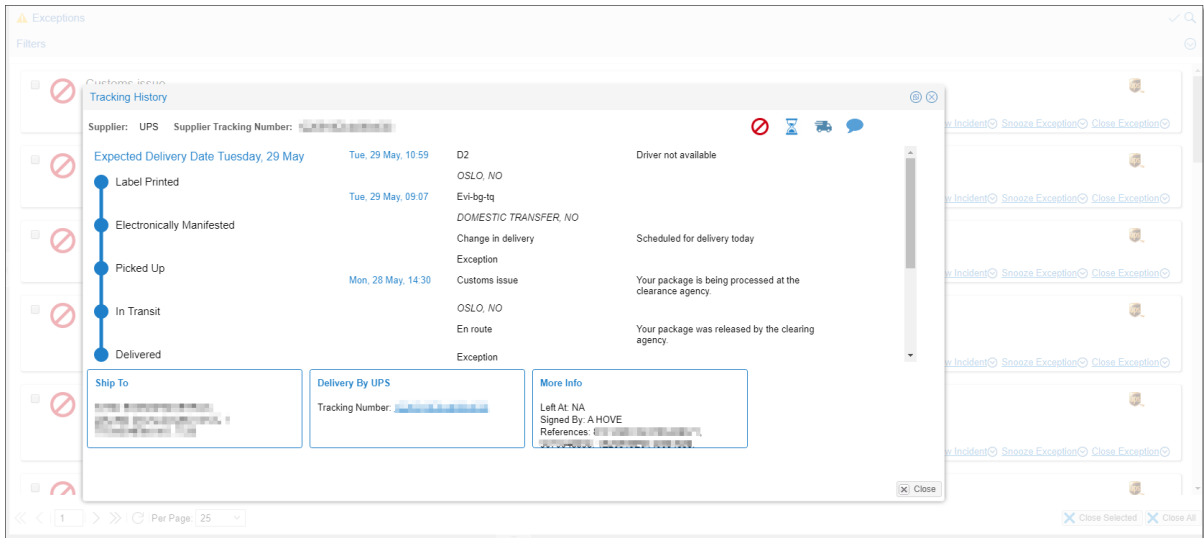
- An icon to indicate its severity
- A brief description of the delay
- The supplier
- The account number
- The tracking number
- The date and time of the exception update

Fig. 4.2
Exception Record



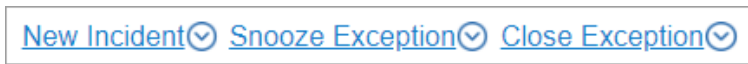
The tracking number contains a hyperlink that, when clicked, opens the *Tracking History* window. For more information, see *Tracking History*.

Fig. 4.3
Tracking History Window



Each record also contains buttons that allow you to perform actions on the exception:

Fig. 4.4
Exception Action Buttons

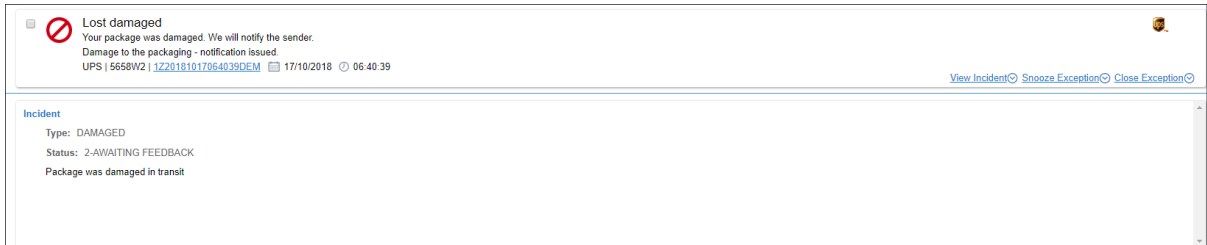


- View Incident
- New Incident
- Snooze Exception
- Close Exception

View Incident


If an incident exists for an exception, you have the option of seeing more details—such as the type, status, and incident comment—using the *View Incident* button.

Fig. 4.5
View Incident



New Incident

Incidents enable you to communicate directly with the supplier in order to resolve issues. When you create an incident, an email is sent to the supplier containing the incident description, and an incident record is created on the *Incidents* page.

You can create a new incident for an exception by clicking the *New Incident*  button on an exception record.

There are two mandatory fields; *Type* and *Comment*. There is also an optional *Email* field that allows you to send the details of the incident to an email address. For more information on creating incident types, see the *Delivery Exception Management Administration Guide*.

Note If an incident already exists, the *View Incident* button replaces the *New Incident* button on an exception record.

Fig. 4.6
New Incident Window



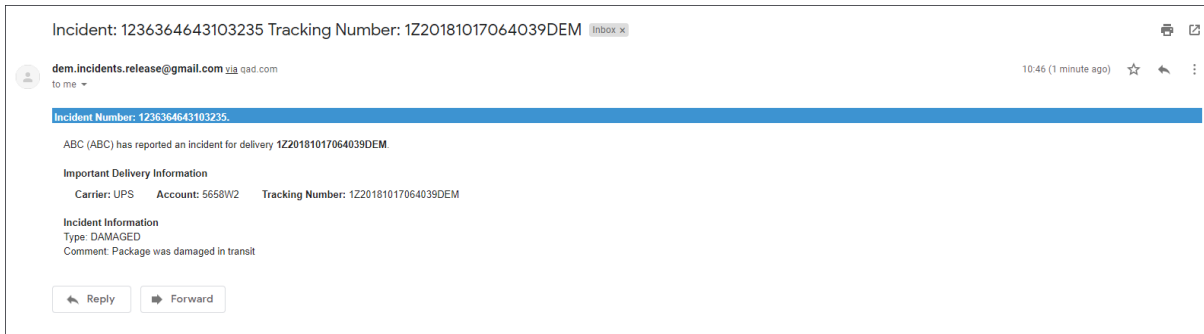
The structure of the email is as follows:

- The subject of the New Incident email contains both the incident number and tracking number.
- The first line of the email indicates who created the incident.



- The body of the email contains the carrier, account number, and tracking number of the delivery. It also includes the type and comment associated with the incident.

Fig. 4.7
New Incident Email

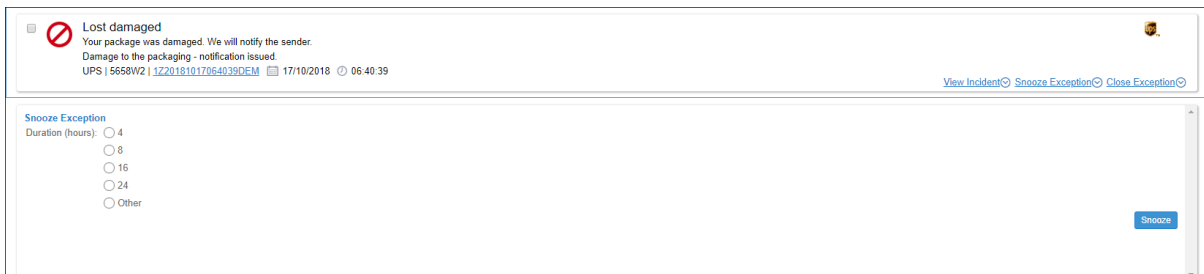


Snooze Exception

The *Snooze Exception* button allows you to snooze an exception for up to 72 hours. You have the option of choosing *4 hours*, *8 hours*, *16 hours*, *24 hours*, or *Other*. If you select *Other*, you can specify any number of hours between 1 and 72.

When you snooze an exception, it is hidden from the *Exceptions* page for the selected number of hours for all users. If the exception is not closed in the intervening time period, it becomes visible again on the *Exceptions* page.

Fig. 4.8
Snooze Exceptions Options



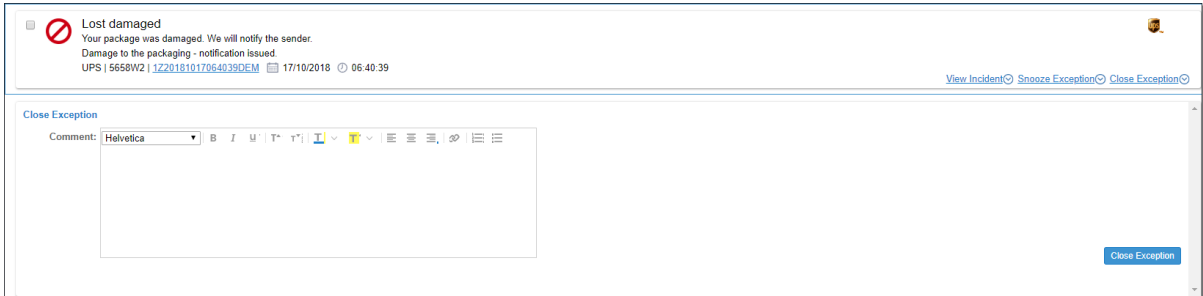
Note All exceptions—including snoozed exceptions that are hidden from the *Exceptions* page—can be viewed in the *Exceptions* window that is accessible from the delivery sub-menu. Check the *Snooze Until* column in this window to determine whether an exception has been snoozed.

Close Exception

Clicking the *Close Exception* button opens the *Close Exception* window. Here, you can add a mandatory comment and then click the *Close Exception* button.

Fig. 4.9

Close Exception Window



Chapter 5

Incidents

This section describes the functionality available from the Incidents page.

Overview

Provides an overview of incidents.

Creating an Incident

Explains how to create an incident that is unrelated to an existing exception.

Viewing an Incident

Describes the various actions that you can perform on incident records.



Overview

Incidents enable you to communicate directly with the supplier in order to resolve issues. When you create an incident, an email is sent to the supplier containing the text of the incident, and an incident record is created on the *Incidents* page.

You can create an incident related to an exception on the *Exceptions* page. For more information, see *Exceptions - New Incident*.

You can also raise an incident that is unrelated to an exception on the *Incidents* page. All incidents can be viewed on the *Incidents* page.

Fig. 5.1

Incidents Page

The screenshot shows the 'Incidents' page interface. At the top, there is a search template dropdown and a 'New Incident' button. Below this is a 'Filters' section. The main area displays a list of incidents, each with a bell icon, a title (e.g., LOST, LATE, DAMAGED), an exception code, a tracking number, a supplier name, a date, and a time. Each incident entry has three action buttons: 'Update Incident', 'View Conversation', and 'Close Incident'. At the bottom, there is a pagination control showing '1 of 12' items, 'Per Page: 25', and '1 - 25 of 289'.

Creating an Incident

To create a new incident that is unrelated to an existing exception:

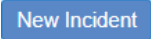
1. Click the *New Incident*  button at the top of the *Incidents* page.
2. Enter the tracking number related to the delivery in the *Tracking Number* field and click *Search*.

Fig. 5.2
New Incident Tracking Number Field

The screenshot shows the 'Incidents' page header with a search icon and a filter icon. Below the header is a 'Filters' section. In the main content area, there is a 'New Incident' button in the top right corner. Below that, the 'New Incident' section contains a 'Tracking Number' input field followed by a 'Search' button.

3. There are two mandatory fields; *Type* and *Comment*. There is also an optional *Email* field that allows you to send the details of the incident to an email address.

Fig. 5.3
New Incident

The screenshot shows the 'New Incident' form. It includes a 'Tracking Number' field with the value 'IL20200929150000DEM05' and a 'Search' button. Below this is an 'Email' field. A message states: 'Configuration User - All Roles (QCONFIG) has reported an incident for delivery DHL20200929150000DEM05.' The 'Important Delivery Information' section shows 'Carrier: DHL', 'Account: 190097118', and 'Tracking Number: DHL20200929150000DEM05'. The 'Incident Information' section has a 'Type' dropdown menu and a 'Comment' field with a rich text editor toolbar. 'Save' and 'Cancel' buttons are at the bottom right.

4. Finally, click *Save*.

Fig. 5.4
Incident Record

The screenshot shows an incident record for a 'DAMAGED' status. It includes an hourglass icon, the text 'DAMAGED', and 'Exception Code: Address problem'. Below this is 'UPS | 3Y2606 | [link]'. The record is assigned to 'QAUTO' on '26/11/2021' at '17:07:06'. At the bottom right, there are three action links: 'Update Incident', 'View Conversation', and 'Close Incident', each with a dropdown arrow.

Viewing an Incident



Each incident record contains:

- The incident type; for example, *LATE*.
- The exception code for the delivery; for example, *Customs Issue*.
- The supplier.
- The account number.
- The delivery tracking number.
- The user who created the incident.
- The date and time that the incident was created.

An icon on each record also indicates whether it is pending review by the user, or awaiting review from the supplier.

Table 5.1

Incident Icons

Icon	Status	Explanation
	Review	Indicates that an update about this incident was received from the supplier and is pending review/action by the user.
	Awaiting Feedback	Indicates that the supplier has not yet responded to the user's most recent message on the incident.

Each record also contains buttons that allow you to perform actions on the incident:

- Update Incident
- View Conversation
- Close Incident

Close Incident

When an incident is resolved, you can close it to remove it from the grid.

To close an incident:


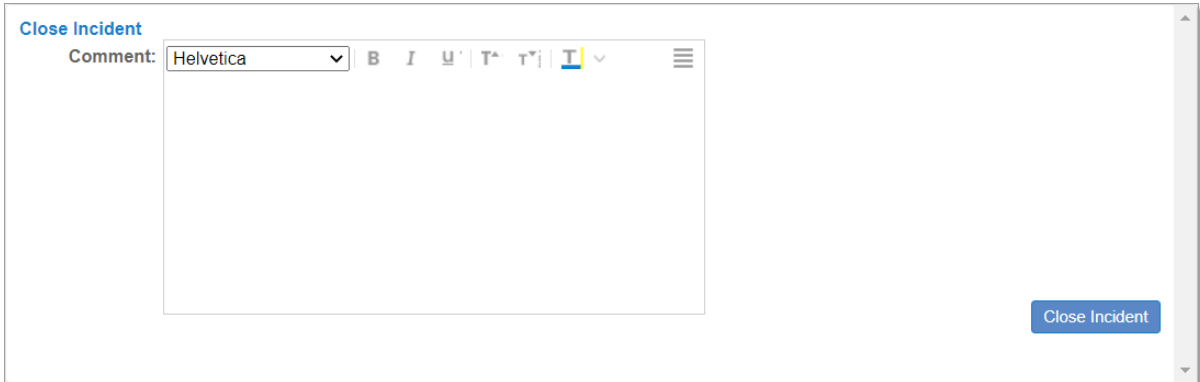
1. Click the *Close Incident*  button. The *Close Incident* window displays.

Fig. 5.7

Close Incident Window



2. Add a mandatory comment in the *Comment* field.
3. Click the *Close Incident* button.

Note All comments related to incidents remain visible in the *Comments* window. To view an incident's full history, access the *Incidents* option in the delivery sub-menu on the *Deliveries* page.

Chapter 6

Status Update Entry

This section describes the Status Update Entry menu option.

Overview

Explains the purpose of status update entries and how to create one.



Overview

You can manually update the status of a delivery using the form on the *Status Update Entry* page.

Fig. 6.1

Status Update Entry Page

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" and a time input field showing "10:09".
- * Status:** A text input field with a search icon.
- Description:** A large text area.
- 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.

Note Manually entered *Status Update Entries* appear as updates on the tracking history for the delivery.

The *Supplier*, *Tracking Number(s)*, *Status Date*, and *Status* fields are mandatory. The *Description*, *Country*, *State or Province*, *City*, and *Postal Code* fields are optional, depending on how much detail you want to provide about the status.

Check the *Create Another* box if you want to enter more than one update.

An error message appears 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.

Chapter 7

Dashboard

This section describes the purpose of the Operational Analytics dashboards.

Overview

Explains the functionality available on the DEM dashboard.



Overview

The Operational Analytics dashboards provide a snapshot view of current compliance activity and shipping analytics. This customizable view consists of a series of bar charts, line charts, and grids that can easily be added, rearranged, or removed according to company needs. Visual items, such as grids and charts, offer a quick, simple format for you to check performance in one location. In addition, these charts can have drill-down capability, enabling you to view a more detailed breakdown of the information by clicking chart data.

The DEM Dashboard is available for Operational Analytics customers. For more information, see the *Operational Analytics User Guide*.



Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

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