OneBx Training – Transport

Taking a delivery from booking to proof of delivery, for planners and bookings staff.

The examples use a made-up demo company, **Demo Logistics Ltd**, which delivers furniture for its customer **Example Furniture** from its warehouse (LE11). Your screens show your own company, teams and customers.

1. What Transport is for and who uses it

Transport is where every delivery and collection is booked, planned onto a van, agreed with the customer and closed with a proof of delivery (POD). Whatever you do here flows on to the driver's phone, the customer's messages and the invoice, so getting the job right first time saves work for everyone else.

Who	What they do in Transport	Permission they need
Planners (Operations team)	Plan multi-drop trips for our own vans, send date messages, despatch trips	Plan jobs & trips
Bookings team	Book same-day jobs, give them to our vans or to contractors	Bookings
Managers	Check margins, overdue and incomplete jobs	Plan jobs & trips, See costs & margins
Accounts	Read jobs and charges before invoicing	View only
Drivers	See their trip on the phone app (separate manual)	Driver app

2. Before you start

An Owner or admin sets these up once; planners only need to check they are there. If something below is missing, the screens will tell you (for example the Planner says there is no planning team yet).

Setting	Where	Who
A planning team (Multi-drop TMS or Single-job TMS) with a team code such as OPS or BKS	Settings → Teams	Owner
Job and trip number formats (J-1001, T-1001)	Settings → Company → Job, trip and query numbers	Owner
Our sites and the base postcode	Settings → Company → Sites; Settings → Planning & delivery	Owner
Vehicles with weight and space limits and the licence needed	TMS → Fleet & checks → Vehicles	Fleet manager
Drivers with their licences and app access	Settings → People	Owner or HR
Customers with a rate card and delivery zones	Customers → Pricing	Accounts or Sales
Texts and emails switched on, and the message wording	Settings → Customer update settings	Owner
Last time a customer can accept a date (1:30pm the working day before, unless changed)	Settings → Customer delivery messages	Owner

You will need the **Plan jobs & trips** or **Bookings** permission to change jobs. Everyone else can look but not change.

3. The screens

All Transport screens are under **TMS** in the left-hand menu. The Planner’s name starts with your team code, for example **OPS Planner**.

Screen	Where	What it is for
OPS Planner	TMS → OPS Planner	Your day, week or month: every job, the trips they are on, and the boxes that need attention (Unplanned, Overdue, Incomplete, Waiting for POD)
BKS Planner	TMS → BKS Planner	The Bookings desk for same-day jobs: book, allocate, offer to contractors
Jobs	TMS → Jobs	Every job, searchable by number, reference, postcode or address. Tabs for Call list and Incomplete jobs
Job page	Click any job	One job: Overview, Details, Charges & cost, Delivery & POD, Offers, Messages, History
Trips	TMS → Trips	One card per van run, with drops, fill, margin and warnings
Trip page	Click a trip	Drops in order, the four steps, customer confirmations, run sheet, route
Call list	TMS → Jobs → Call list	Customers who have not confirmed their date yet, to ring
Incomplete jobs	TMS → Jobs → Incomplete	Open jobs missing a price, postcode, weight or other details
Week board	Planner → Week board	Vans and drivers across the week, time off, vehicles off the road, day notes
Vehicle Locations	Planner → Vehicle Locations	The live map of vans that are out
Import jobs	Planner → Import jobs	Turn a customer’s order spreadsheet into jobs

4. How a job moves

1. **Booked** – the job waits on the Planner under Unplanned.
2. **Planned** – it is put on a trip (a van run).
3. **Date sent** – the customer gets a text and email with the day.
4. **Confirmed** – the customer says yes, or you ring them.
5. **Finalised** – the trip is locked and the run sheet printed.
6. **Despatched** – the van has left; the job is loaded.
7. **Delivered** – the driver closes the drop in the app.
8. **POD in** – signature and photos are saved with the job.

A customer who asks for a new date goes back to planning; a drop that fails goes back to **To plan** to be rebooked.

5. Step by step: book a job

A job is one order from a customer: at least one collection or delivery, the goods and the price. Example: Example Furniture wants a 3-seater sofa delivered to Mrs A Sample, LE2 3AB.

1. Go to **TMS → OPS Planner** and press **Add job** (or **New job** on any job page).
2. **Customer:** type “Exam” and pick **Example Furniture**. Their usual team, service and driver instructions fill in.
3. If a box asks **Which team is this job for?**, choose the team doing the work. The job won’t save until you answer.
4. **Customer ref / PO:** type their order number, e.g. EF-20418. Leave **Delivery date** empty if it isn’t planned yet.
5. **Collections & Deliveries:** press **Add collection**, choose **Saved address or our site** and pick our warehouse. Set the collection **date**; it is required.
6. Press **Add delivery** and type the address. Start typing the postcode and pick the suggestion so the town and county fill in. Add the contact’s name, mobile and email; the date message goes to these.
7. **Goods:** one line per item. Type “sofa” in **Item type** to use the size guide, then pieces, kg and CBM if you have them.

8. **Extras & Instructions:** tick requirements such as **Two people** or **Booking-in**, and any driver tasks such as **Room of choice**. Driver instructions go on the run sheet; office notes never reach the driver.
9. Open **Charges & cost** and press **Price from rate card**. Check the lines, then **Use these charges**.
10. Press **Save**. The job gets its number (e.g. J-1042) and waits on the Planner under **Unplanned**.

Lots of orders at once? Use **Import jobs** on the Planner with the customer's spreadsheet. Any drop-down column the system can't match turns amber with **Pick one**; nothing imports until every amber box is picked.

6. Step by step: plan a trip on the Planner

A trip is one van run. Its jobs are the drops, in order. Example: tomorrow's van DE21 MOO with driver Sam Driver takes six drops around Leicester.

Quickest way: tick and make a trip

1. On the **OPS Planner**, click the **Unplanned** box.
2. Tick the jobs that belong together. The bar at the bottom shows the pieces, weight and volume.
3. Press **Make a trip**. Pick the **day**, **vehicle**, **driver** and, if you know it, a **start time**.
4. Read any warnings: too heavy for the van, driver off that day, or jobs booked for another day.
5. Press **Make the trip**. The drops are put in the best order and the trip opens (e.g. T-1027).

One job at a time: Allocate

1. Press **Allocate** on the job's row.
2. On the **Trip** tab, trips already going to that area with room come first. Press **Add to T-1027**.
3. Or use the **Van & Driver** tab and **Put on this van**. Short of a van or driver, use **+ Hire vehicle** or **+ Agency driver**.

Check the trip

1. Open the trip. Look at the **Route** box: miles, driving time and back-at-base time.
2. If **Optimise route** shows, it has found a shorter order. Check it and accept.
3. Change **On site** minutes for long jobs, such as a kitchen fitting, so the arrival times are right.
4. Clear any red warnings: over weight, MOT out of date, driver not licensed for the vehicle.

A job on a trip is always dated inside the trip's days. If you move the trip's dates, its jobs move with it, and any customer already sent a date goes back to Not contacted.

7. Step by step: send date messages and deal with the answers

Customers confirm their delivery day from a short link on their phone. A confirmed drop turns green and the trip shows **Customers agreed x/y**.

Send the dates

1. On the trip, press **Move to Ready to confirm**.
2. Press **Message all (6)** at the top of the drops. Each customer gets one text and one email; nobody is messaged twice.
3. Read the summary: who was sent, who failed, who was skipped (no mobile or email).
4. A drop showing **failed** in red has a wrong number or email. Fix it on the job and press **Send** on that drop.

What the customer gets (example text):

> Demo Logistics: Your Example Furniture delivery can come Mon 9 Nov. Tap to confirm or change by 1:30pm Fri (replies not read): getonebx.com/d/K7QM2XP9RT

Their answers

What the customer does	What you see	What to do
Presses **Yes, Monday works**	Drop turns **Confirmed**; a pop-up tells your team	Nothing
Presses **Request a new delivery date** and writes a note	Drop turns **Rearrange requested**; it comes first on the Call list with their note	Ring them, agree a day, use **Wants another day → Move if it fits**
Tries after the cut-off or after the date changed	Pop-up "couldn't answer online" with the reason; a line in the job's History	Ring them
Says nothing	A chaser goes from 10am the next working day; still nothing a working day later and the drop shows **No reply – call**	Ring them from the Call list

Ringing customers: the Call list

1. Go to **TMS → Jobs → Call list** (or **Call list** at the top of the trip).
2. Tap the phone number to ring.
3. Press what happened: **Confirmed**, **No answer** or **Wants another day**.

The **answer rate** under the Call list title shows how many customers answer within 2 hours. Watch it after changing message wording.

The evening before

When you **Finalise** the trip, every drop gets a 3-hour time slot from its arrival time. Slots go out automatically at 8pm the evening before, but only for finalised trips. A trip not finalised by then is held and its customers get nothing.

8. Step by step: finalise and despatch a trip

A trip moves through four steps, shown in one row near the top of the trip page. **Move to …** goes forward and **Back to …** goes back.

Step	What it means	What you do
1. In planning	Building the trip	Add drops, put them in order
2. Ready to confirm	The order is agreed	Send date messages, work the Call list
3. Finalised	Customers have confirmed; drops are locked	Print the run sheet; time slots go out at 8pm
4. Despatched	The van has left; jobs become **Loaded**	Watch progress, deal with late jobs
Completed	Every drop delivered or failed	Happens by itself

1. When most drops show **Confirmed**, press **Move to Finalised**. You'll be asked first if some customers haven't confirmed. Take off anyone who said no and replace them before 8pm.
2. Press **Run sheet**, then **Print or save as PDF**. It has a pick & load list in reverse drop order and a box per drop. **Copy for WhatsApp** gives a short list to send an agency driver.
3. Check **Start times**: the lead driver starts early enough for vehicle checks. Times are fixed when the trip is finalised.
4. When the van leaves, press **Move to Despatched**. The driver's app usually does this when they press **Start trip**.

A job comes in while the van is out

1. On the despatched trip, press **Add late job**.
2. Pick the job. It shows where it would fit on what's left of the trip, the extra miles and whether a later drop would now be late.

3. Type **Why** and press **Add as drop ...**. The crew get a pop-up on their phones.
4. Customers already sent a time are not messaged again. Ring any the warning says will now be late.

Running late: when a driver presses **Running late** in the app, an amber box shows on the trip and the ETAs move back. Customers are not told automatically. Use **Send** on the drops or ring them, then press **Clear**.

9. Step by step: give a job to a contractor

When our own vans can't do a job, the Bookings team sends it to contractors. Contractors see the towns and postcode areas only, never the customer's name or our price, until they are booked.

Book a contractor you already know

1. Press **Allocate** on the job and open the **Subbie** tab.
2. Pick the contractor, type **their booking ref** and **their cost**.
3. Save. The job becomes **Booked**.

Ask several contractors for a price

1. On the job, set the **vehicle size** under **Vehicle & Load**. It decides who can be asked.
2. Open the **Offers** tab. Choose **Ask for prices**, or **Fixed rate** and type the rate.
3. Tick the contractors you want. Each shows a score out of 5; anyone under 2.5 has a warning.
4. To reach every suitable contractor, tick **Put it on the load board**.
5. Press **Send offer**. Each gets a text or email and sees it in their app.
6. Prices come in cheapest first. The **£ button** in the top bar shows how many jobs have new prices.
7. Press **Book** on the one you want. Everyone else is told it's gone.

No longer needed? Press **Cancel load** and choose **Sold elsewhere**, **Customer cancelled** or **Other**.

Contractor job steps: To book → Booked → On site → Collected → On site at delivery → Delivered. The contractor taps each step in their app, and the job's **Delivery & POD** tab shows their progress. Late or slow steps are flagged.

10. Step by step: delivered, PODs, extras and incomplete jobs

Most drops are closed by the driver in the app: they tick the items, take the signature and photos, and the job becomes **Delivered** with its POD. The office steps below are for when that doesn't happen.

Mark a drop by hand (driver phoned in)

1. On the despatched trip, press **Delivered** on the drop. Enter the time, who signed and a note, and add the POD photo or scan now or later.
2. Or press **Failed**, choose a reason (e.g. Not home) and add a note. The job goes back to **To plan** to rebook.
3. **Mark all delivered** closes every drop still out. Add PODs afterwards with **Add POD**.

Waiting for POD: delivered jobs with no POD are listed in the **Waiting for POD** box on the Planner. Add the POD from the job's **Delivery & POD** tab.

Extra work the driver flagged

1. Go to **TMS → Jobs → Extras to check**. Each shows the driver's note, photos and the rate-card price if there is one.
2. Press **Approve** to add it as a charge, **Change** to adjust it first, or **Reject**.
3. Nothing is charged until someone decides.

Incomplete jobs

1. Go to **TMS → Jobs → Incomplete**.
2. Pick your team and click a chip, e.g. **No price** or **No delivery phone**.
3. Click the missing item on a job. The job opens with that box ready; fill it in and **Save**. It drops off the list.

Work this list daily. A job with no phone or email can't get a date message, and a job with no price can't be invoiced.

11. What the customer and the driver see

Knowing what is on the other person's screen helps when they ring in.

When	The customer sees	The driver sees
Date sent	A text and email with the date and a short link; their page shows the date with **Confirm Monday** and **Request a new delivery date**	Nothing yet
Trip finalised	Nothing new	The trip on **Today** with their start time
8pm the evening before	A 3-hour time slot by text and email	Same trip, final order
Van out	Their page shows how many stops are before them and a map	Next drop, Navigate, Call, Running late
At the drop	–	Tick items, signature, photos, extra work
Delivered	A delivered email with the POD or delivery note PDF	The next drop

The note for the customer (the button at the top of a job) shows on their portal and their delivery page. Keep it to what they should read, for example "Driver running about 30 minutes late". Driver instructions and office notes are never shown to customers.

To see exactly what a customer sees, open the drop on the trip and press **Customer's page**.

12. Tips and common mistakes

- **Always add a mobile and an email to the delivery contact.** Without them no date message can go, and the drop sits as Not contacted.
- **Pick the postcode from the suggestions.** A mistyped postcode breaks the route, the price and the Due by date.
- **Answer "Which team is this job for?" honestly.** It decides whose figures the job counts in.
- **Don't type a subcontractor's cost in two places.** Put it in **Their cost** on the Subbie tab, not also as a charge line.
- **Finalise trips before 8pm.** A trip that isn't finalised is held, and its customers get no time slot.
- **Move the trip, not the job.** Change the trip's dates and its jobs follow; customers already sent a date go back to Not contacted so you can message them again.
- **Take off customers who said no before the evening send.** Everyone still on a finalised trip gets a slot.
- **Ctrl-click (⌘-click on a Mac) a job to open it in a new tab**, so you keep your place on the Planner.
- **If someone else changed the job while you had it open,** you'll be warned before saving. Reload and check their change first.
- **Use Free of charge** for goodwill or our-fault redeliveries. Don't delete the charges; the job just won't be invoiced.

13. Questions people ask

A customer says their link "has expired". Why? The link closes at the cut-off (1:30pm the working day before), if the date changed, if the job came off the trip, or if you pressed **Cancel link**. Your team gets a pop-up when this happens, with the reason. Ring them, or press **Send** again to give them a link for the new date.

The customer replied to the text or email. Is the date confirmed? No. Replies aren't read; the message says so. They must press **Confirm** on their page, or you mark the drop **Confirmed** after ringing.

Why can’t I add a drop to this trip? It’s **Finalised** or **Despatched**. Press **Back to …** to step it back, or use **Add late job** if the van is already out.

Why is this job on everyone’s Planner? It has an amber **No team** tag. Open it and pick a team.

Why is the price missing? The customer has no rate card line for that zone or size. Use **Add charge** by hand, or ask Accounts to update the rate card.

A job failed. What now? It goes back to **To plan** with the reason in its history. Plan it on another trip and message the customer again.

Can I see what the contractor charged before booking? Yes. Prices show on the job’s **Offers** tab and under the **£ button** in the top bar, cheapest first.

14. Quick-reference card

Print this page and pin it by your desk.

I want to…	Go to	Press
Book a job	OPS Planner	**Add job** → fill in → **Price from rate card** → **Save**
Load a customer’s spreadsheet	OPS Planner	**Import jobs**
Make a trip from several jobs	Planner → Unplanned	Tick jobs → **Make a trip**
Put one job on a van	Any job row	**Allocate** → Trip or Van & Driver
Send date messages	Trip page	**Move to Ready to confirm** → **Message all**
Ring customers who haven’t answered	TMS → Jobs	**Call list** tab
Lock the trip and print	Trip page	**Move to Finalised** → **Run sheet**
Add a job to a van that’s out	Trip page	**Add late job**
Send a job to contractors	Job page	**Offers** tab → **Send offer** → **Book**
Close a drop the driver phoned in	Trip page	**Delivered** or **Failed**
Find jobs with missing details	TMS → Jobs	**Incomplete** tab
Decide on driver extras	TMS → Jobs	**Extras to check** tab

Every day: clear **Unplanned**, **Overdue**, **Incomplete** and **Waiting for POD** on the Planner, work the **Call list**, and finalise tomorrow’s trips before 8pm.