

# Scheduling Appointments

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Quick Guide

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# 1. Scheduling Appointments for Controlled Shipments

Users can use the ONE network to schedule pickup and delivery appointments for controlled and non-controlled shipments. Instructions for live pickups/deliveries and drop pickups/deliveries from different screens in the UI are provided below.

## Schedule a Live Pickup or Delivery Appointment from the Search Shipments Screen

Complete the following steps to schedule a live pickup or delivery appointment:

1. Click **Menus/Favs > Transportation > Search Shipments** to locate a controlled shipment. For more instructions how to search for a shipment, see the "[Searching Shipments](#)" section. In NEO UI, users can click the Menus/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."

The Search Shipments screen displays.

Shipment	Cost	Shipper	Consignee	Pickup	Delivery	Target Pickup/Actual Pickup	Target Delivery/Actual Delivery	Arrived Location/Arrived Date
1244164	No Cost	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/20/2024 12:54 AM EST Create [ Live / Drop ]	1/31/2024 12:54 AM EST Create [ Live / Drop ]	1/20/2024 12:54 AM EST/ 1/23/2024 7:18 AM EST	1/31/2024 12:54 AM EST/ 2/16/2024 11:54 AM EST	RTVN4000QA3: 1/23/2024 7:18
24- Ship-QA3-23012024-15	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/30/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	RTVN4000QA3: 1/29/2024 4:57
24-6 Ship-QA3-23012024-6	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/30/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	
24- Ship-QA3-23012024-16	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/30/2024 5:00 AM - 7:00 AM EST [ 530041 Live ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	RTVN4000QA3: 1/29/2024 4:57
24-7 Ship-QA3-23012024-7	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/30/2024 11:16 PM - 11:16 PM EST Create [ Live / Drop ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	

2. Click the **Live** link located under the **Pickup** (or **Delivery**) column for a movement/shipment.

Carrier NEO Dashboard Search Shipments

**Search Shipments**

Filters (edit): [State: Tendered, Confirmed, Pick Ready, Intransit, Delivery Ready, Re-] [Delivery Range: 1/28/2024 - 2/27/2024]

Shipment	Cost	Shipper	Consignee	Pickup	Delivery	Target Pickup/Actual Pickup	Target Delivery/Actual Delivery	Arrived Location/Arrived Date
1244164	No Cost	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/20/2024 12:54 AM EST Create [ Live / Drop ]	1/31/2024 12:54 AM EST Create [ Live / Drop ]	1/20/2024 12:54 AM EST/ 1/23/2024 7:18 AM EST	1/31/2024 12:54 AM EST/ 2/16/2024 11:54 AM EST	RTVN4000QA3: 1/23/2024 7:18
24-Ship-QA3-23012024-15	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM -11:16 PM EST Create [ Live / Drop ]	1/30/2024 11:16 PM -11:16 PM EST Create [ Live / Drop ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	RTVN4000QA3: 1/29/2024 4:57
24-6 Ship-QA3-23012024-6	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM -11:16 PM EST Create [ Live / Drop ]	1/30/2024 11:16 PM -11:16 PM EST Create [ Live / Drop ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	
24-Ship-QA3-23012024-16	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM -11:16 PM EST Create [ Live / Drop ]	1/30/2024 5:00 AM -7:00 AM EST [ 530041 Live ]	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	RTVN4000QA3: 1/29/2024 4:57
24-7 Ship-QA3-23012024-7	40.00 USD	RTVN4000QA3Site11 AutoRTVN4000QA... Dallas, TX 75001	RTVN4000QA3Site12 AutoRTVN4000QA... Fortworth, TX 76199	1/26/2024 11:16 PM -11:16 PM EST	1/30/2024 11:16 PM -11:16 PM EST	1/26/2024 11:16 PM EST	1/30/2024 11:16 PM EST	

Page: 1 more... Viewing 1-20

Export to CSV Map Selected View Route Actions

The Create Live Pickup Appointment screen displays.

Carrier NEO Dashboard Search Shipments Create Live Pickup Appointment

**Create Live Pickup Appointment**

\* Shipment: 1244164 Add More

Site: RTVN4000QA3Site11

\* Type: Pickup Live

Movement: M-1244164

Target Date: 1/20/2024 12:54 AM EST

Notes: View/Add Notes

Reservation Id:

Appointment Type:

Contact:

Phone:

Load:

Supplier Partners: AutoRTVN4000QA3Shipper1

Max Candidates: 3

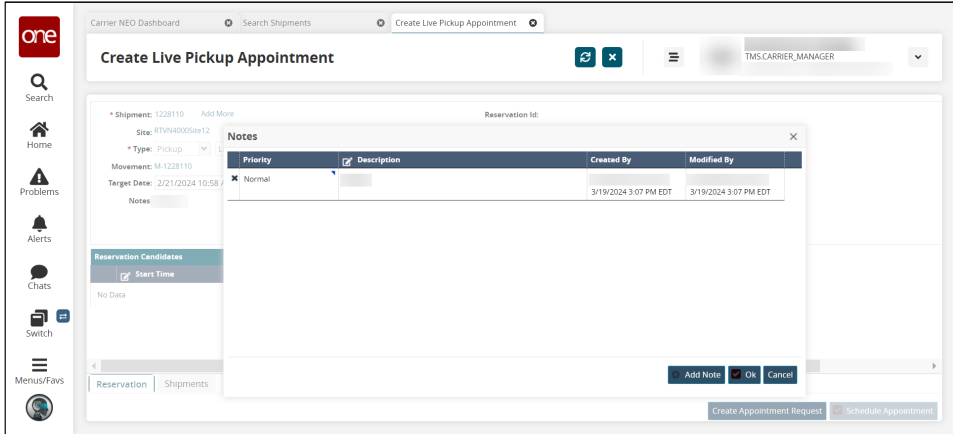
**Reservation Candidates**

Start Time	Slot Type
No Data	

Reservation Shipments

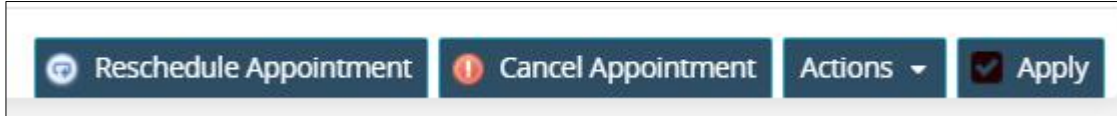
Create Appointment Request Schedule Appointment

3. Enter values for the fields described in the table below. Fields with an asterisk (\*) are required.

Field	Description
*Shipment	This field auto-populates with a shipment number. Click the Add More link to add more shipments. See the "Adding Shipments to Existing Appointments" section of the <i>NEO Online Help</i> for more information.
Site	This field auto-populates with a site name.
*Type	These fields auto-populate based on what link was used to get to this screen (Live/Drop and Pickup/Delivery).
Target Date	This field auto-populates with the target date.  Click the calendar and clock icons to select a date and time for the appointment  Click the Reset Target Date icon ↺ to revert back to the original target date.
Notes	Existing notes display.  Click the View/Add Notes to view more information or add a new notes.  The Notes popup displays.
	
	Complete the following instructions to add a new note:
	<ol style="list-style-type: none"> <li>a. Click the Add Note button to add a new notes. A new row displays.</li> <li>b. Enter information in the Description field.</li> <li>c. Click the OK button. The note is saved.</li> <li>d. Click the Close button to close the popup.</li> </ol>
Reservation ID	This field auto-populates.
Appointment Type	This field auto-populates.
*Contact	Enter a contact name.
*Phone Number	Enter a phone number.
Load	This field auto-populates.
Supplier Partners	This field auto-populates.
Max Candidates	Select the maximum number of appointment candidates to display in the Reservation Candidates table.

Appointment times display in the Reservation Candidates table. If there are no appointment times available in the system, the page shows "No Data." See [Creating Appointment Requests](#) in the *NEO Online Help* for instructions. You can also request a new appointment if none of the available appointment times work.

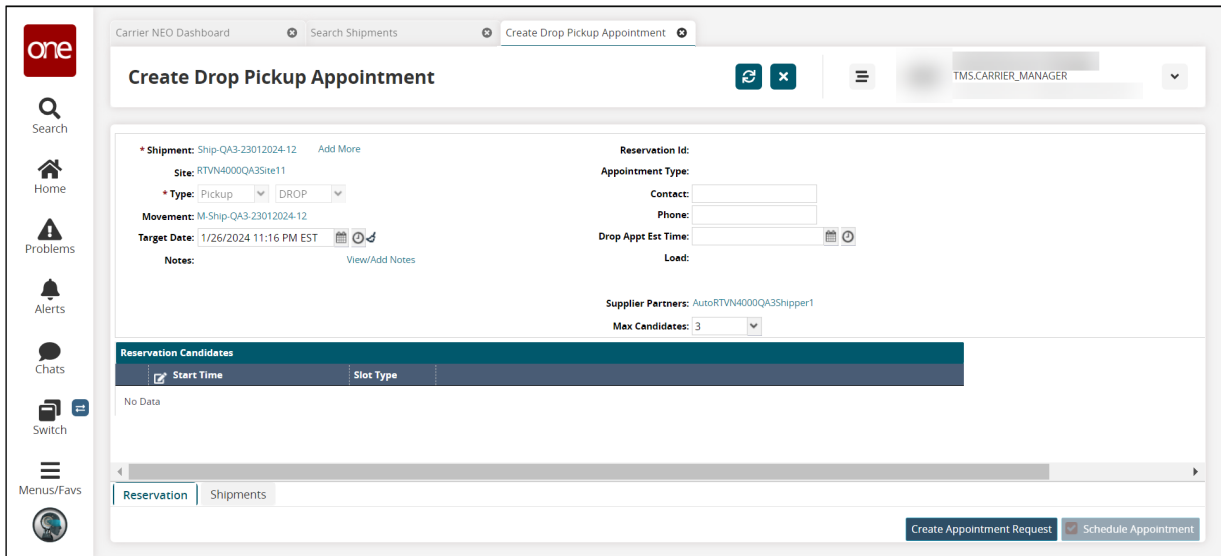
4. Check the box to select an appointment time.  
The Schedule Appointment button activates.
5. Click the **Schedule Appointment** button to schedule an appointment.  
A green success bar displays and new action buttons are available at the bottom of the screen.



## Scheduling a Drop Pickup or Delivery Appointment from the Search Shipments Screen

Complete the following steps to schedule a drop delivery appointment:

1. Locate a PO number located under the **Shipment** column.
2. Click the **Drop** link located under the **Delivery** column.  
The Create Drop Delivery Appointment screen displays.

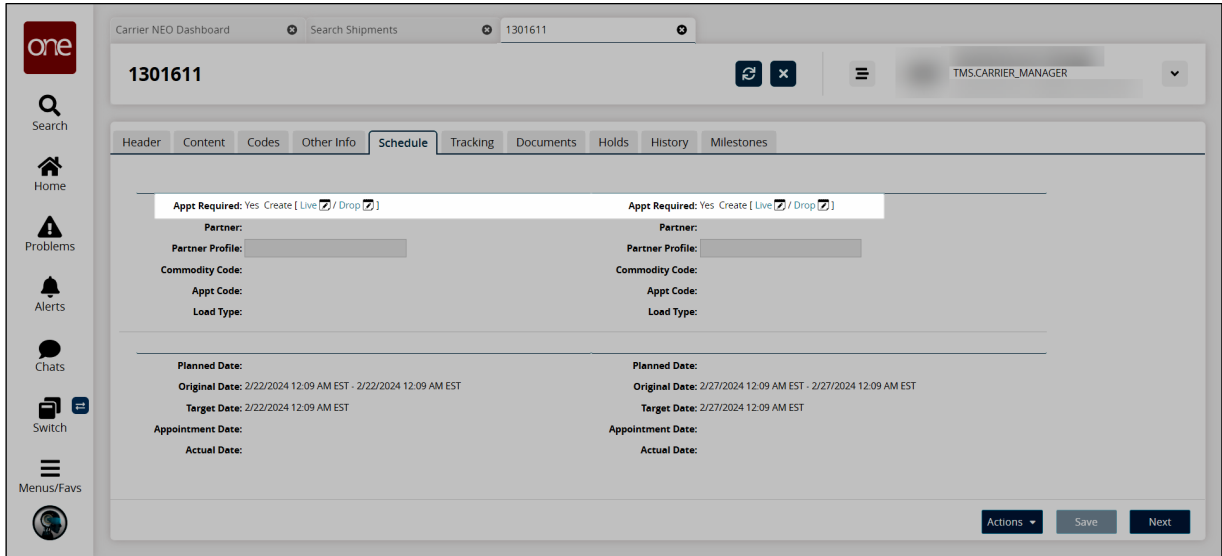


3. Enter information for fields, which are described above except the following.
4. Click the calendar and clock icons to select the date for the **Drop Appt Est Date** field, and follow the same steps as above.

## Scheduling Appointments from the Shipment Details Screen

Users can schedule live or drop appointments for pickup or delivery from the shipment's details screen. Once here, users following the same instructions as above.

1. Click **Menus/Favs > Transportation > Search Shipments** to locate a shipment. Users can also perform a global search.
2. Click the shipment number link to open the details page.
3. Click the **Scheduling** tab.  
The scheduling information displays.



4. Click the **Live** or **Drop** links on the left to set a pickup appointment.  
The screens from the instructions above display. Follow the appropriate instructions to schedule the appointment.
5. Click the **Live** or **Drop** links on the right to set a delivery appointment.  
The screens from the instructions above display. Follow the appropriate instructions to schedule the appointment.