

Scheduling Appointments for Non-Controlled Shipments Quick Guide

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1. Scheduling Appointments for Non-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 > Non-Controlled Shipments** for non-controlled shipments. 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 Non-Controlled Shipments screen displays.

Shipment	Cost	Shipper	Consignee	Pickup	Delivery	Target Pickup/Actual Pickup	Target Delivery/Actual Delivery	Arrived Location/Arrived Date	Links	State/Status	Order Ref No
1346879	No Cost	DC3 Charlotte, NC 28201	DC5 Irving, TX 75063	03/28/24 12:40 AM	03/30/24 12:40 AM	03/28/24 12:40 AM / 03/27/24 12:47 AM	03/30/24 12:40 AM / 03/27/24 12:51 AM		HT	Delivered...	1346879
1348507	No Cost	DC1 Austin, TX 73301	DC2 Greenville, TX 75401	03/30/24 2:04 AM - 2:04 AM	03/31/24 2:04 AM - 2:04 AM	03/30/24 2:04 AM	03/31/24 2:04 AM	DC1 / 03/29/24 1:45 AM	HT	Confirmed... At Site	1348507
1348548	No Cost	ApprSch_Site3 Tampa, FL 33602	ApprSch_Site4 Greenville, TX 75401	03/30/24 2:59 AM - 2:59 AM Create [Live]	04/01/24 2:59 AM - 2:59 AM Create [Live]	03/30/24 2:59 AM	04/01/24 2:59 AM		HT	Confirmed...	1348548
1348599	No Cost	ApprSchUpload_Site... Austin, TX 73301	ApprSchUpload_Site... Dallas, TX 75244	03/30/24 4:56 AM - 4:56 AM Create [Live]	04/01/24 12:00 AM - 2:00 AM [557889 Live]	03/30/24 4:56 AM	04/01/24 4:56 AM		HT	Confirmed... Scheduled - Delivery	1348599
1348600	No Cost	ApprSchUpload_Site... Austin, TX 73301	ApprSchUpload_Site... Dallas, TX 75244	03/30/24 4:57 AM - 4:57 AM Create [Live]	04/01/24 12:00 AM - 2:00 AM [557889 Live]	03/30/24 4:57 AM	04/01/24 4:56 AM		HT	Confirmed... Scheduled - Delivery	1348600
1348611	No Cost	LoadTypeSite1 Brandon, TX 75442	LoadTypeSite1_Ve... Q/Vendor5 Austin, TX 73301	03/30/24 5:36 AM - 5:36 AM Create [Live]	04/01/24 5:36 AM - 5:36 AM Create [Live]	03/30/24 5:36 AM	04/01/24 5:36 AM		HT	Confirmed...	1348611

2. Click the **Live** link located under the **Pickup** (or **Delivery**) column for a movement/shipment. In the example below, we clicked the Live link under Delivery. The Create Live Delivery Appointment screen displays. The Create Live Pickup Appointment will look the same.

Carrier NED Dashboard > Non-Controlled Shipments > Create Live Delivery Appointment

Create Live Delivery Appointment

* Shipment: 1348548 [Add More](#)
 Site: AppSch_Site4
 * Type: Delivery Live
 Target Date: 04/01/2024 2:59 AM 📅 🔍
 Notes: [View/Add Notes](#)

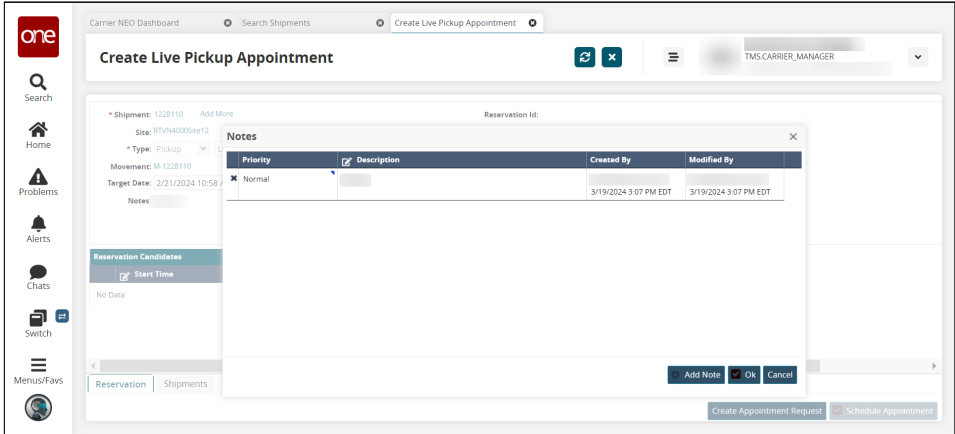
Reservation ID:
 Appointment Type:
 Contact:
 Phone:
 Load:

Supplier Partners: QARetailer24
 Max Candidates: 5

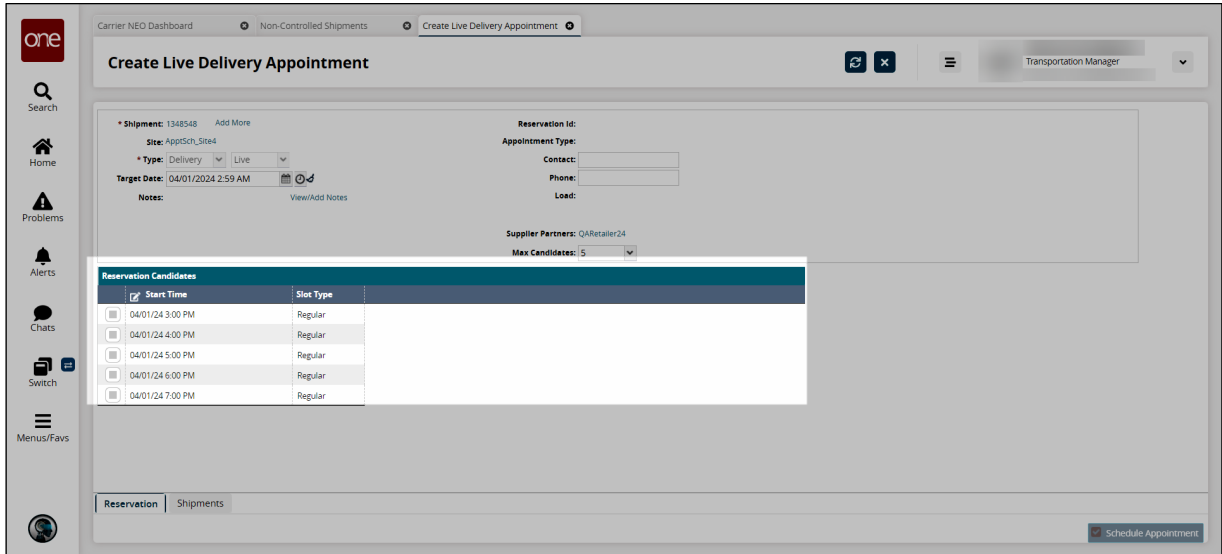
Start Time	Slot Type
<input type="checkbox"/> 04/01/24 3:00 PM	Regular
<input type="checkbox"/> 04/01/24 4:00 PM	Regular
<input type="checkbox"/> 04/01/24 5:00 PM	Regular
<input type="checkbox"/> 04/01/24 6:00 PM	Regular
<input type="checkbox"/> 04/01/24 7:00 PM	Regular

[Reservation](#) [Shipments](#)
Schedule Appointment

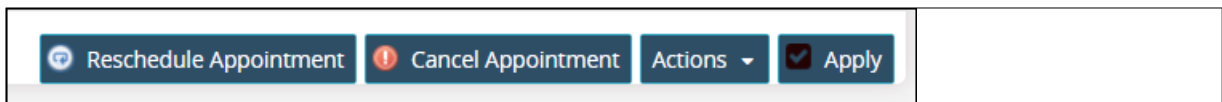
3. Enter values for the fields described in the table below. Fields with an asterisk (*) are required.

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 clicked 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 target delivery date. 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.
	
	<p>Complete the following instructions to add a new note:</p> <ol style="list-style-type: none"> Click the Add Note button to add a new notes. A new row displays. Enter information in the Description field. Click the Ok button. The note is saved. Click the Close button to close the popup.
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 as highlighted below. 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.



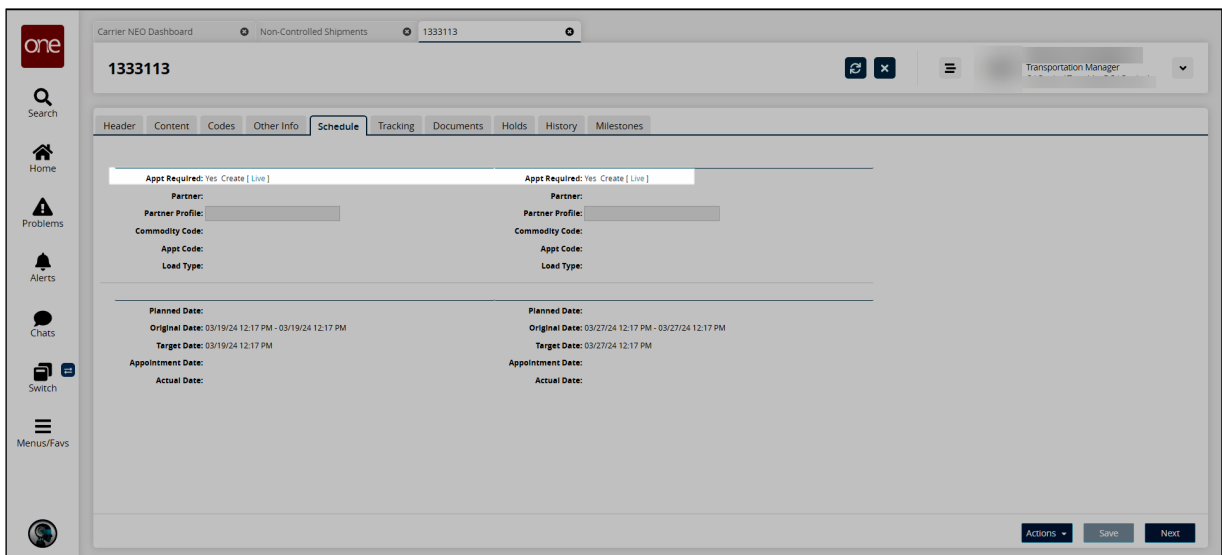
4. Select a appointment time.
The Schedule Appointment activates.
5. Click the **Schedule Appointment** button to schedule the appointment.
A green success bar displays and new action buttons are available at the bottom of the screen.



Scheduling Appointments from the Shipment Details Screen

Users can schedule 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 > Non-Controlled 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** link on the left to schedule a pickup appointment.
The screens from the instructions above display. Follow the appropriate instructions to schedule the appointment.
5. Click the **Live** link on the right to set a delivery appointment.
The screens from the instructions above display. Follow the appropriate instructions to schedule the appointment.