



SETTING UP A LOAD - ALLOCATE LOAD (PHASE A)

Owner: T. Guire

NACD-WH-DS-SOP-9

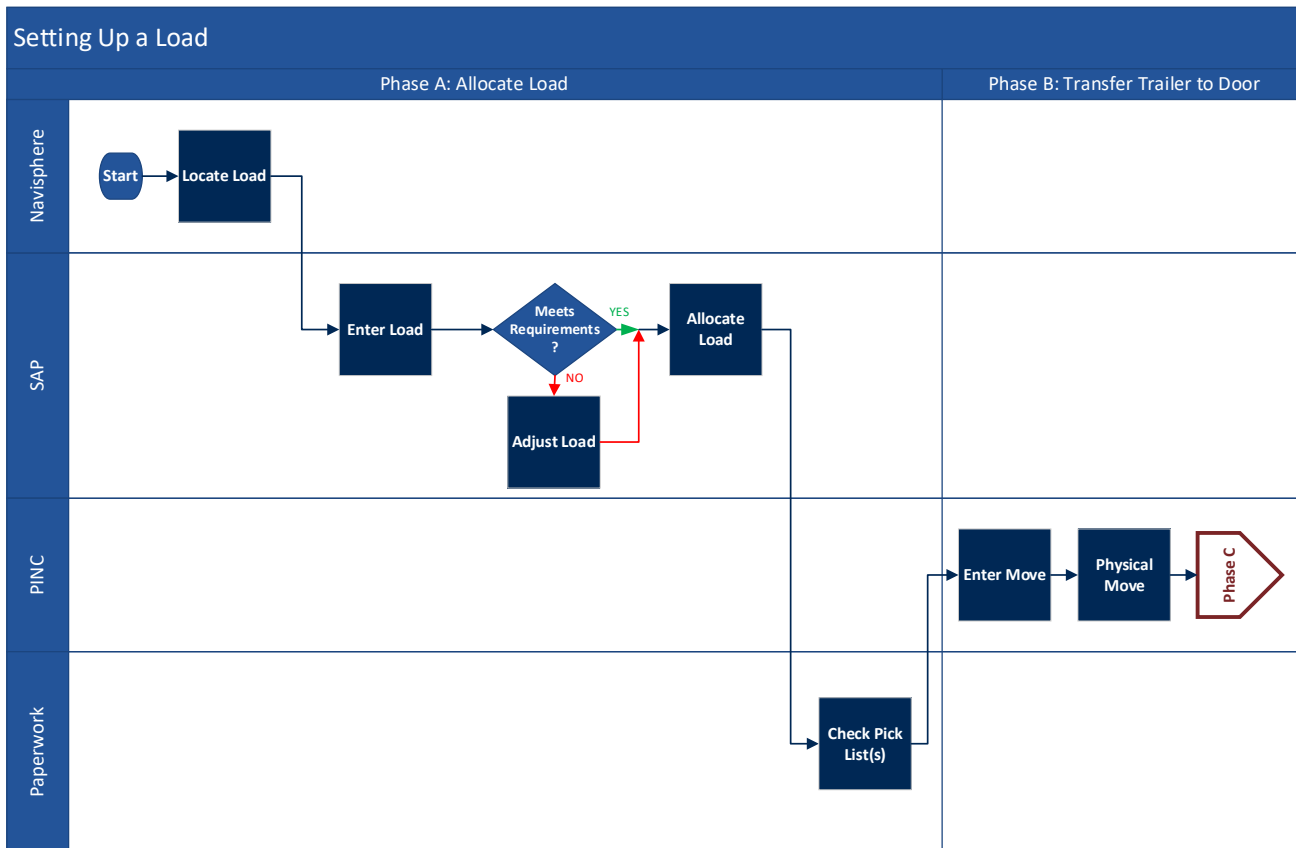
Approved by: R. Handler

Rev: 1

Rev. Date: 12/12/2022

Phase A: Allocate Load

In **Phase A**, Dispatch will locate [Order #](#) in Navisphere for product to be loaded onto a trailer that meets shipping requirements. Diagram shows systems Dispatch uses to accomplish task.





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1. **Locate Load** (Navisphere): Dispatch locates a confirmed pickup order with high priority.

At top of Dock and Yard Manager screen, use drop-down menus to select:

- A. [Order Status] = Confirmed
- B. [Appointment Type] = Pickup
- C. [Date Range] = previous day's date to tomorrow's date

Order #	Load #	Ref #	Trailer #	Notes	Drop Tr	Drop Date	Ready Date	Appt #	Carrier	Type	U/L	Due Date	Appt Date	Status	Load Status	Mode	Quick Appt
1393408	405176725	2145597_2148054			Yes	8/2/2022 07:00	8/2/2022 07:00	0999804	Prime Inc. OTR	PU	No	8/2/2022	8/2/2022 07:00	Confirmed	Checked In	RO	
1393158	405050689	2145599			Yes	8/2/2022 10:00	8/2/2022 10:00	10005302	Prime Inc. OTR	PU	No	8/2/2022	8/2/2022 10:00	Confirmed	Checked In	RO	
1393721	405708425	2150594	T29		No			10008233	Arrive Logistics	PU	No	8/2/2022	8/2/2022 10:00	Confirmed	Checked In	VO	

A

Order Status

Confirmed ▼

B

Appointment Type

Pickup ▼

Due Date

Due Date Appt. Date Both Dates

8/2/2022 ▼ | 8/3/2022 ▼

C



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2. **Locate Load** (Navisphere): Dispatch continues from previous step...

At bottom of Dock and Yard Manager Screen, find a trailer that meets following criteria,

- A. **DropTrl** column = "Yes" for Pre-Loads (No for Live Loads)
- B. **Carrier** column = carrier to be used for shipments to this customer
- C. **Appt Date** column: A time that can be fulfilled, in order from the top.
 - o Pre-Loads by scheduled appointment time
 - o Live loads within 2 hours of appointment time unless late arrivals which get worked into schedule when possible.
 - o Occasionally, you'll notice that Due Date is pushed out & doesn't match Appt Date; when this occurs, use Due Date. Double-check Due Date in SAP.)
- D. **Mode** column = Type of container booked for appointment
 - o RO = Refrigerated
 - o RIO = Refrigerated Intermodal
 - o VO = Dry Van
 - o IO = Dry Intermodal

After locating trailer, copy number under **Order #** for use with SAP in next step.

Order #	Load #	Ref #	Trailer #	Notes	Drop Trl	Drop Date	Ready Date	Appt #	Carrier	Type	TL	Due Date	Appt Date	Status	Load Status	Mode	Quick Appt
1393409	45176725	2145597,2146054			Yes	8/2/2022 07:00	8/2/2022 07:00	9999804	Prime Inc. OTR	PU	No	8/2/2022	8/2/2022 07:00	Confirmed	Checked In	RO	
1393409	45056689	2145599			Yes	8/2/2022 10:00	8/2/2022 10:00	1000530	Prime Inc. OTR	PU	No	8/2/2022	8/2/2022 10:00	Confirmed	Checked In	RO	
1393409	405708425	2150594	T29		No			1000823	Arrive Logistics	PU	No	8/2/2022	8/2/2022 10:00	Confirmed	Checked In	VO	
139183	405048500	2145216			No			10001436	Best/Feich Logistics	PU	No	8/2/2022	8/2/2022 11:00	Confirmed	Checked In	VO	



Copy Order # which meets 4 criteria (A-D)

A

Drop Trl	D
Yes	8
Yes	8
No	

B


Carrier
Prime Inc. OTR
Prime Inc. OTR

C

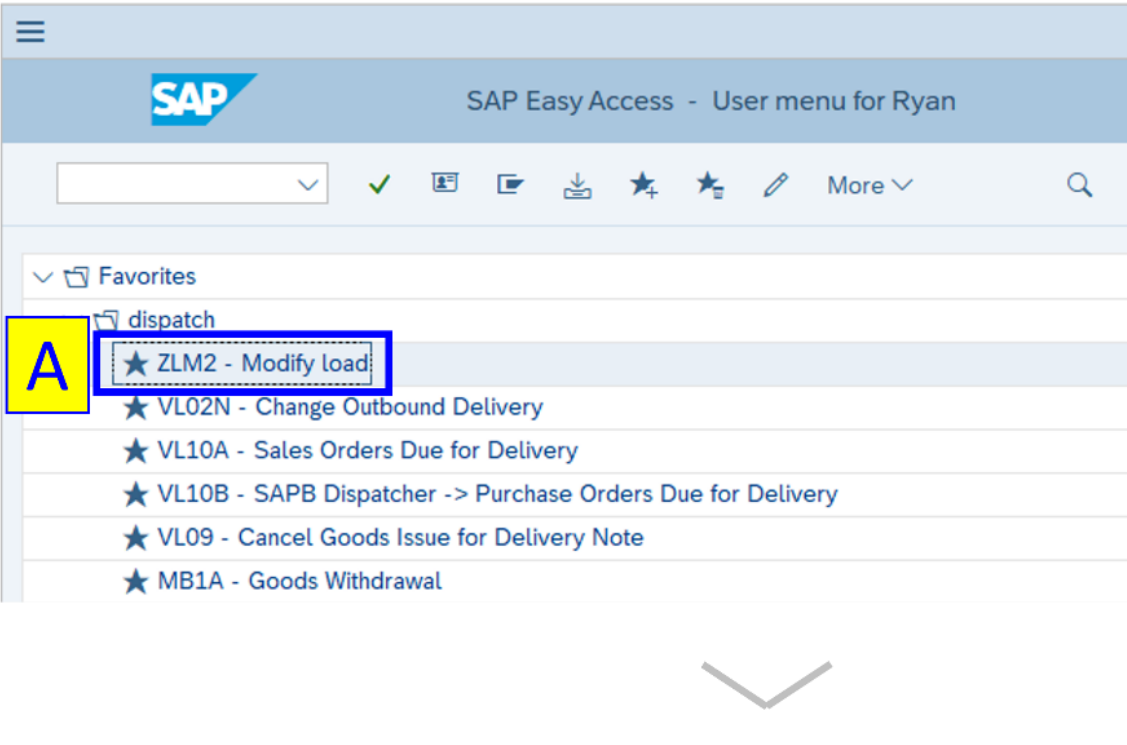
Appt. Date
8/2/2022 07:00
8/2/2022 10:00

D

Mode
RO
RO
VO

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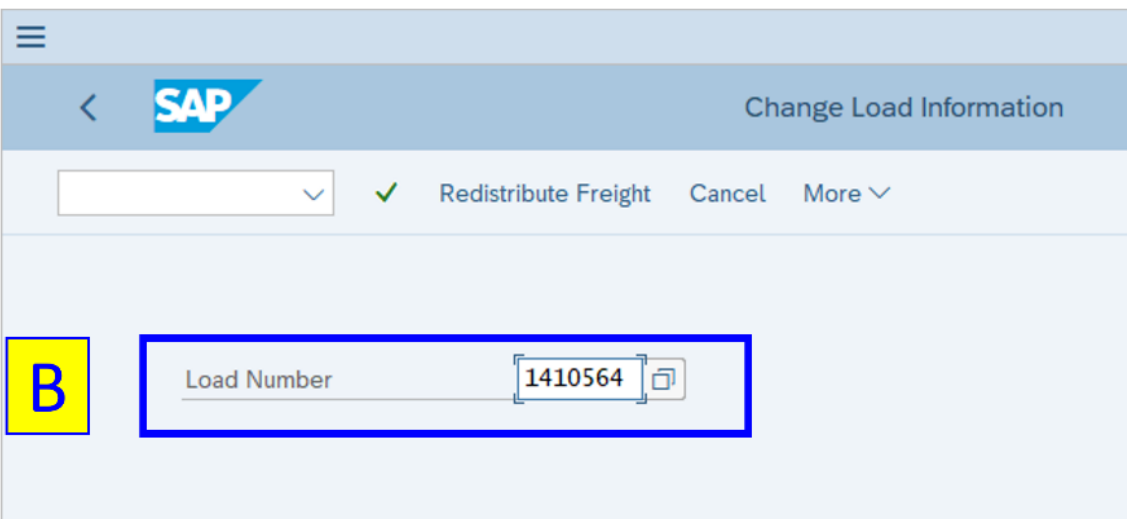
3. **Enter Load** (SAP): Dispatch enters Order # obtained from last step as [Load Number] in SAP – enabling Dispatch to check that load meets shipping requirements.
- A. Launch ★ **ZLM2 – Modify Load** transaction
 In Change Load Information screen, enter: [Load Number] = Order # copied from Navisphere in Step 2
 - B. Press ENTER on keyboard



SAP Easy Access - User menu for Ryan


dispatch

- ★ ZLM2 - Modify load
- ★ VL02N - Change Outbound Delivery
- ★ VL10A - Sales Orders Due for Delivery
- ★ VL10B - SAPB Dispatcher -> Purchase Orders Due for Delivery
- ★ VL09 - Cancel Goods Issue for Delivery Note
- ★ MB1A - Goods Withdrawal





Change Load Information

Load Number: 1410564

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4. **Allocate Load** (SAP): Dispatch continues from previous step...

Here we show what happens if all is well. This sequence will need to be repeated for each Sales Order included with the load.

- A. Click to place a R beside the Sales Order
- B. Click  Background
- C. Check if  Log display was started [View details](#) ("Log display was started. [View details](#)") appears at bottom of window that requires troubleshooting to proceed with order; if none, Sales Order has been successfully allocated to load, & a new row with a Delivery Number for the Sales Order will appear below original row.
 - Suppose load has 3 Sales Orders executed in top-to-bottom order (per Step 7), then:
 - First (lowest) Delivery Number = First Pick List Printed = First Stop = Last Loaded
 - Last (highest) Delivery Number = Last Pick List Printed = Last Stop = First Loaded

