



Client Connect

Quick Start Guide

Version 2.00

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Book A Consignment

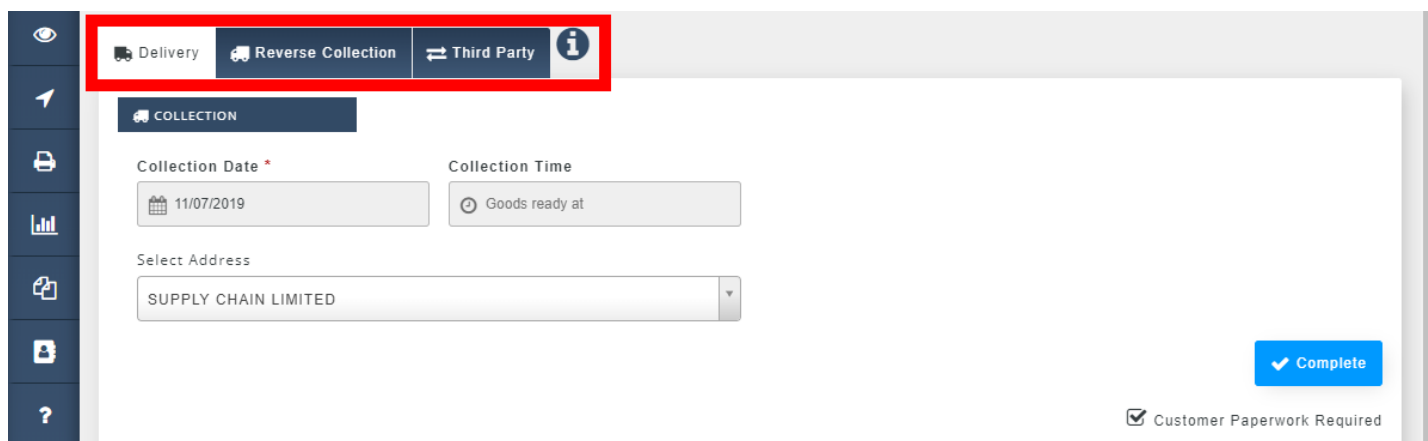
To Navigate to the consignment entry screen, click on the  icon in the menu.

Select the Appropriate Tab for the Job You Wish To Enter

Following customer feedback, we have introduced three types of consignment:

- Deliveries
- Reverse Collections
- Third Party

Select the appropriate tab for the booking you wish to make.



The screenshot shows the 'COLLECTION' entry screen. At the top, there are three tabs: 'Delivery', 'Reverse Collection', and 'Third Party'. The 'Reverse Collection' tab is highlighted with a red box. Below the tabs, the 'COLLECTION' section is visible. It includes a 'Collection Date' field with the value '11/07/2019', a 'Collection Time' field with the value 'Goods ready at', and a 'Select Address' dropdown menu with the value 'SUPPLY CHAIN LIMITED'. A blue 'Complete' button is located at the bottom right, and a checkbox for 'Customer Paperwork Required' is checked.

Sections

We aimed to make entering a consignment as quick and easy as possible, by creating a step by step process.

So we have split the job entry screen into 5 sections:

- Collection
- Reference
- Delivery
- Consignment Details
- Notes

Enter Collection Details

In this section you enter the collection address and the collection date. The collection date must be in the future and may be effected by any cut off times your administrator has set.

If the collection is from a site address you will get a pre-populated dropdown to select from.

A screenshot of the 'Enter Account Code / Name or Postcode to search for an address.' dropdown menu. The dropdown is highlighted with a red border. Below the dropdown are two input fields: 'Company Name or Individual *' and 'Contact'.

If collection is not from a site address you will have an auto complete box and an address form.

The company name and address fields are required for a valid entry.

A screenshot of the address and contact form. The 'Company Name or Individual *' and 'Address *' fields are highlighted with a red border. The 'Address *' section includes fields for 'House No. / Property Name *', 'Street', 'Town / City', 'County / State', 'Postcode *', and a 'GBR' dropdown menu. To the right are fields for 'Contact', 'Phone Number', and 'Email'. At the bottom right are three buttons: 'Reset Address', 'Remember This Address', and 'Complete'.

Additional fields available are for additional contact information and saving the address for future use on other consignments.

Once your collection details are correct, click complete to move onto the reference section.

A screenshot of the collection details summary and reference section. The 'COLLECTION' section is highlighted with a red border and contains a truck icon, the address 'Vigo Software, The Old Forge, HEWELL LANE, REDDITCH, WORCESTERSHIRE, B97 6QL, GBR', and the date '11/07/2019'. Below this is the 'REFERENCE' section with input fields for 'Customer Reference' and 'Order Number'. A 'Complete' button is highlighted with a red border at the bottom right.

Enter Reference Details

In this section you can enter;

- Consignment Number (if applicable)
- Customer Reference
- Order Number

The screenshot shows the 'REFERENCE' section of the application. On the left is a navigation menu with icons for home, user, and help. The main area has a dark blue header with 'REFERENCE' and an information icon. Below the header are two input fields: 'Customer Reference' and 'Order Number'. Both fields are highlighted with a red border. To the right of these fields is a blue button with a checkmark and the text 'Complete', also highlighted with a red border.

Once your collection details are correct, click complete to move onto the reference section.

The screenshot shows the 'REFERENCE' section after data entry. The 'Customer Reference' field now contains the text 'VIG0001' and the 'Order Number' field contains 'AP001'. The entire section is highlighted with a red border. In the top right corner of the section, there is a blue button with a pencil icon and the text 'Edit'. Below the 'REFERENCE' section, a dark blue header for the 'DELIVERY' section is visible.

Enter Delivery Details

In this section you enter the delivery address and contact information.

If the delivery is to a site address you will get a pre-populated dropdown to select from.

The screenshot shows the 'DELIVERY' section of the interface. A search bar contains the text 'Enter Account Code / Name or Postcode to search for an address.' Below the search bar is a dropdown menu with a downward arrow on the right side. The entire search bar and dropdown menu are enclosed in a red rectangular box.

If delivery is not to a site address you will have an auto complete box and an address form.

The company name and address fields are required for a valid entry.

The screenshot shows the 'DELIVERY' section with a search dropdown menu containing 'Vigo Software'. Below the search bar, there are several input fields: 'Company Name or Individual *' (containing 'Vigo Software'), 'Address *' (containing 'The Old Forge', 'HEWELL LANE', 'REDDITCH', 'WORCESTERSHIRE', 'B97 6QL', and 'GBR'), 'Contact', 'Phone Number', and 'Email'. At the bottom right, there are three buttons: 'Reset Address', 'Remember This Address', and 'Complete'. The 'Company Name or Individual *' field and the 'Complete' button are highlighted with red boxes.

Additional fields available are for additional contact information and saving the address for future use on other consignments.

Once your delivery details are correct, click complete to move onto the consignment details section.

The screenshot shows the 'DELIVERY' section with a light blue background. The address 'Vigo Software, The Old Forge, HEWELL LANE, REDDITCH, WORCESTERSHIRE, B97 6QL, GBR' is displayed in a text box. An 'Edit' button is located to the right of the text box. Below the text box is a button labeled 'CONSIGNMENT DETAILS'. The entire delivery section is enclosed in a red rectangular box.

Enter Consignment Details

In this section you enter the details of the consignment.

The required fields are:

- Service
- Due Date
- Due Date
- Due Time
- Category
- Spaces
- Weight

Service

Choose a service from the dropdown menu, the services available may be dependant on the postcode entered.

CONSIGNMENT DETAILS

Service: Next Day (dropdown menu highlighted with red box, options: Next Day, Economy)

Due Date: 12/07/2019

Due Time: Anytime (From 09:00 - 17:00)

Full, Half, Quarter, Oversize, Weight (kg), Total Spaces: 0

PT - PALLETS

Complete

Due Date

Choose a due date from the dropdown menu, the available dates will be calculated dependant on the service collected and any working day configuration.

CONSIGNMENT DETAILS

Service: Next Day

Due Date: 12/07/2019 (dropdown menu highlighted with red box, options: 12/07/2019)

Due Time: Anytime (From 09:00 - 17:00)

Category: PT - PALLETS

Quarter, Oversize, Weight (kg), Total Spaces: 0

Complete

Due Time

Choose a due time from the dropdown menu, these relate to the service selected and surcharges configured by your administrator.

CONSIGNMENT DETAILS

Service: Next Day | Due Date: 12/07/2019 | Due Time: Anytime (From 09:00 - 17:00)

Category: PT - PALLETS | Full: | Half: | Weight (kg): | Total Spaces: 0

Non-timed Surcharges

Toggle any non-timed surcharges which are applicable. These relate to the service selected and surcharges configured by your administrator.

CONSIGNMENT DETAILS

Service: Next Day | Due Date: 30/05/2019 | Due Time: Anytime (From 09:00 - 17:00)

Tail Lift: | Amazon Booking:

Category: K - Pallets | Full: | Half: | Quarter: | Oversize: 1 | Weight (kg): 111 | Total Spaces: 0

Category

Choose a Category from the dropdown menu. These are configured by your administrator.

CONSIGNMENT DETAILS

Service: Next Day | Due Date: 12/07/2019 | Due Time: Anytime (From 09:00 - 17:00)

Category: PT - PALLETS | Full: | Half: | Quarter: | Oversize: | Weight (kg): | Total Spaces: 0

Pallet Spaces

Your administrator can set the total spaces to auto-calculate, if this is not turned on you will need to ensure this field is also completed.

CONSIGNMENT DETAILS

Service: Next Day | Due Date: 30/05/2019 | Due Time: Anytime (From 09:00 - 17:00)

Tail Lift: | Amazon Booking:

Category: K - Pallets

Full	Half	Quarter	Oversize	Weight (kg)	Total Spaces
			1	111	0

OS Full	OS Half	OS Quarter	OS Spaces
0	0	0	0

[Complete](#)

If your portal is configured to enter oversize spaces, these fields will show when oversized is populated.

CONSIGNMENT DETAILS

Service: Next Day | Due Date: 30/05/2019 | Due Time: Anytime (From 09:00 - 17:00)

Tail Lift: | Amazon Booking:

Category: K - Pallets

Full	Half	Quarter	Oversize	Weight (kg)	Total Spaces
			1	111	0

OS Full	OS Half	OS Quarter	OS Spaces
0	0	0	0

[Complete](#)

Once your consignment details are correct, click complete to move onto the consignment details section.

CONSIGNMENT DETAILS [Edit](#)

Next Day 12/07/2019 - Anytime (From 09:00 - 17:00)

Category PT - PALLETS

FULL	OVERSIZE	WEIGHT (KG)	TOTAL SPACES
1	1	1	1

NOTES

Enter Consignment Notes

The notes section provides you with the option to add delivery notes to the consignment.

Dependant on your configuration or the addresses used some notes may be pre-populated.

You have the option to enter up to 4 lines of collection and delivery notes dependant on your configuration

Once you have confirmed your notes are correct, click complete. You will be able to review the consignment prior to submitting the booking.

Review and Submit

Once all sections are complete, you can review the booking, and make any edits where necessary

The screenshot displays the 'Review and Submit' page in the Vigo software. The interface features a dark blue header with the Vigo logo, a search bar, and user information (SUP001, Logout). A vertical sidebar on the left contains navigation icons. The main content area is divided into several sections, each with an 'Edit' button:

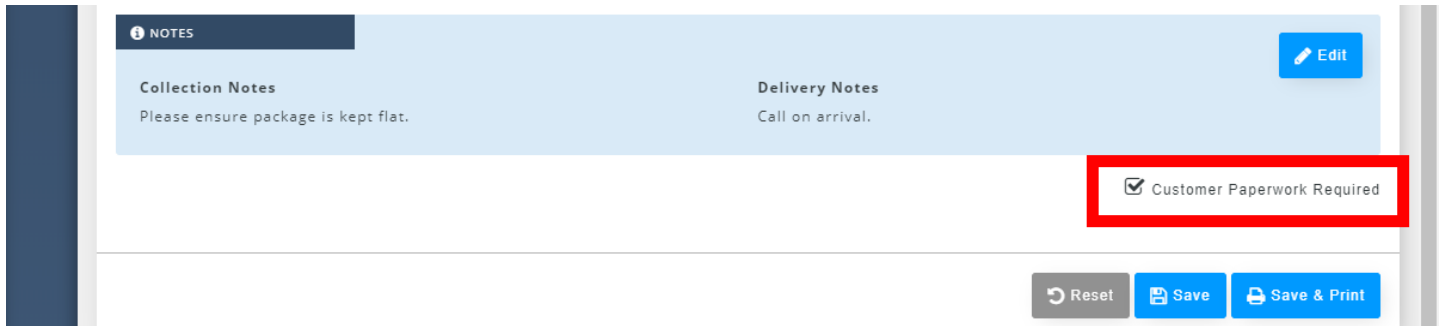
- COLLECTION:** Address: Vigo Software, The Old Forge, HEWELL LANE, REDDITCH, WORCESTERSHIRE, B97 6QL, GBR. Date: 11/07/2019.
- REFERENCE:** No reference details entered.
- DELIVERY:** Address: Vigo Software, The Old Forge, HEWELL LANE, REDDITCH, WORCESTERSHIRE, B97 6QL, GBR.
- CONSIGNMENT DETAILS:** Next Day 12/07/2019 - Anytime (From 09:00 - 17:00). Category: PT - PALLETS.
- NOTES:** Collection Notes: Please ensure package is kept flat. Delivery Notes: Call on arrival.

At the bottom right, there is a checkbox for 'Customer Paperwork Required' (checked) and three buttons: 'Reset', 'Save', and 'Save & Print'.

Customer Paperwork

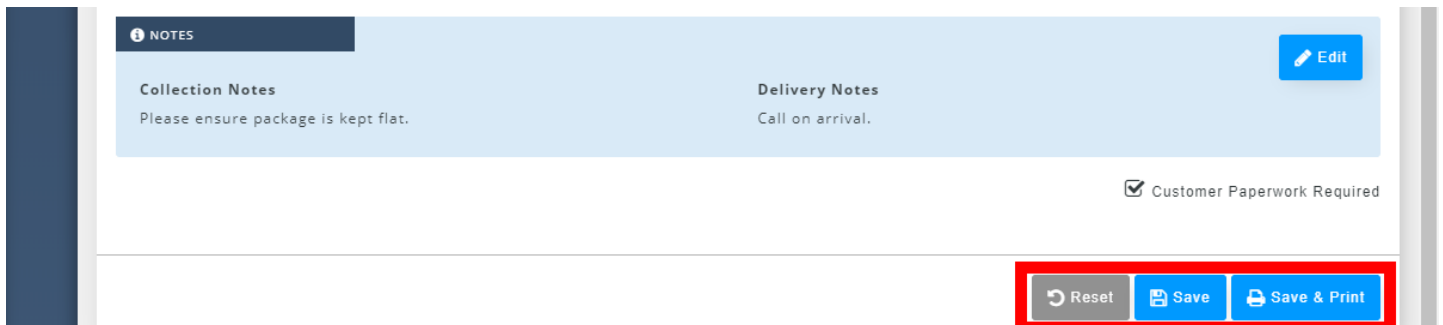
Dependant on your configuration, you have the option to add customer paperwork to the booking after submission.

Check the checkbox, and a prompt will appear after the booking saves successfully.



Saving

You have the option to just save and print a label for the booking, or to just simply save the booking. Click the desired.

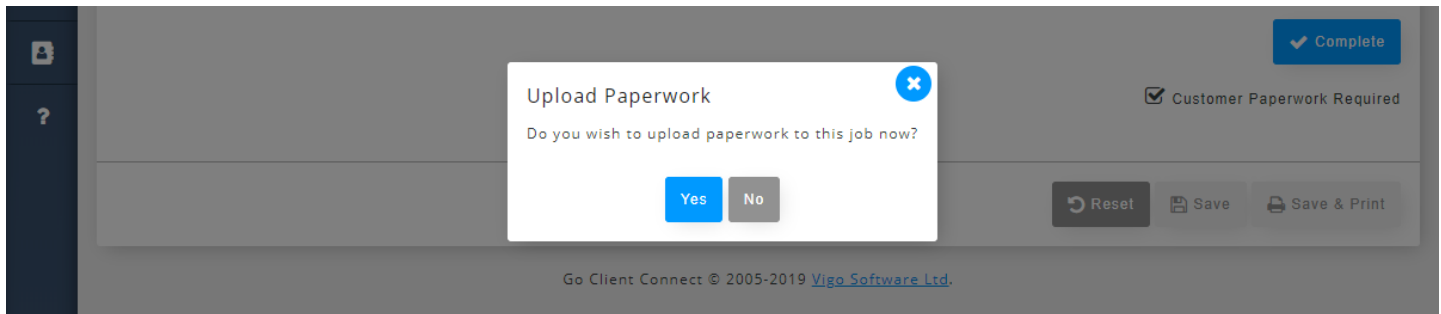


Booking Complete

Once the new job has been saved into the system, a confirmation message will appear confirming the job has been saved.



If the Customer Paperwork Required Checkbox was clicked, a popup box will appear asking you if you wish to upload the paperwork now. Clicking yes will navigate to the page where you can upload paperwork.



If you clicked Save & Print a consignment label will be generated as well.



The system will alert you if information is incorrect or incomplete with alert messages below where you need to update the information.

CONSIGNMENT DETAILS

Service	Due Date	Due Time				
Next Day	12/07/2019	Anytime (From 09:00 - 17:00)				
Category	Full	Half	Quarter	Oversize	Weight (kg)	Total Spaces
PT - PALLETS						0

! Enter a value for either Full, Half, Quarter or Oversize

! Enter a weight

! Invalid total spaces

Customer Paperwork Required

Frequently Asked Questions

How Do I Search for an Address?

Navigate to the Saved Addresses Page. To Navigate to this page, click on the  icon in the menu.

You can search your saved addresses, or for UK postcode or Irish town. Click into the search box to search addresses, the search will start after you have entered 3 characters (You will need to ensure there is a space between postcode parts if searching a full postcode). For example **AB10 1AB** not **AB101AB**.

Enter Account Code / Name or Postcode to search for an address.

b97

Site Addresses

Vigo Software, The Old Forge, HEWELL LANE, REDDITCH, WORCESTERSHIRE, B97 6QL,

Postcode

B97 4AB, CHURCH ROAD, REDDITCH, WORCESTERSHIRE, B97 4AB,

County / State

Postcode *

GBR

Reset Address Remember This Address Complete

Customer Paperwork Required

If you are searching for one of your saved addresses, the system will try to match against the account code you have saved, the account name you have saved, or the postcode relating to that address.

Enter Account Code / Name or Postcode to search for an address.

Vigo Software

Account Code * VIGO **Account Name *** Vigo Software

Company Name or Individual * Vigo Software **Contact**

Address * The Old Forge **Phone Number**

HEWELL LANE

REDDITCH **Email**

WORCESTERSHIRE

B97 6QL

GBR

Default Service Next Day

Default Timed Surcharge - Anytime (From 09:00 - 17:00)

Default Unit PT - PALLETS

Select address type
 Collection Address Delivery Address

Default Address Notes

Reset Address Do Not Remember This Address Save and Complete

Customer Paperwork Required

A search for **M16** would bring up my existing **saved address** to the top of the list, any other matches would display underneath.

Enter Account Code / Name or Postcode to search for an address.

Vigo Software

m16

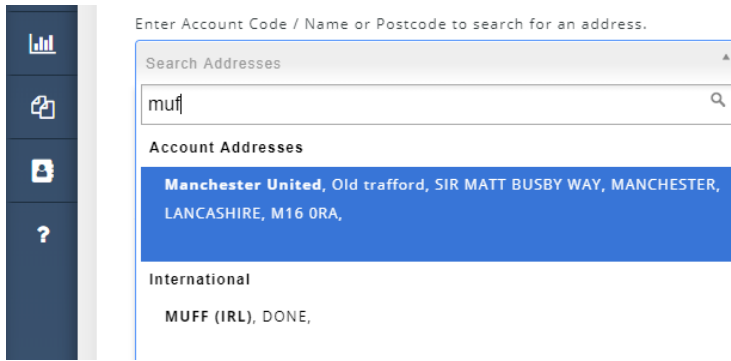
Account Addresses

Manchester United, Old trafford, SIR MATT BUSBY WAY, MANCHESTER, LANCASHIRE, M16 0RA,

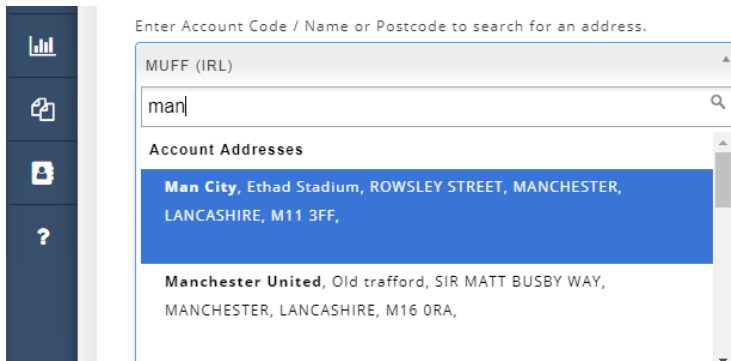
Postcode

M16 0AA, COLLEGE ROAD, MANCHESTER, LANCASHIRE, M16 0AA,

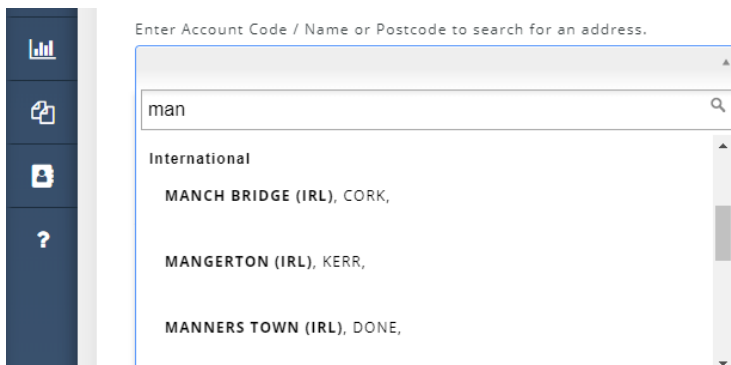
A search for **MUF** would bring it up by matching the **Account Code**.



A search for **Man** would also bring it up by referencing the **Account Name**. If multiple addresses are found they will also display, you can scroll through the list using the mouse wheel, the scroll bar, or the direction keys on your keyboard.



As you can see the search also brings back Irish options, so there is no need to pre-select the country first. Selecting the desired option will then populate the address fields.



The orange exclamation circles warn you that the fields are **Required** (or they have **Invalid characters**).

The screenshot shows a delivery form with a sidebar on the left containing icons for a printer, a bar chart, a location pin, a person, and a question mark. The main form area has a dark blue header with a 'DELIVERY' icon and text. Below the header is a search bar with the text 'Enter Account Code / Name or Postcode to search for an address.' and a dropdown menu showing 'MANNING (IRL)'. The form is divided into two columns. The left column has four sections: 'Company Name or Individual *' with an orange exclamation mark icon, 'Address *' with an orange exclamation mark icon, 'House No. / Property Name *' with an orange exclamation mark icon, and 'Street' with a dropdown menu showing 'MANNING', 'CORK', 'CORK', and 'IRL'. The right column has three sections: 'Contact', 'Phone Number', and 'Email', each with a text input field. A red box highlights the 'Company Name or Individual *' and 'Address *' sections. A black tooltip with white text 'Required / Invalid character detected' and an orange exclamation mark icon is positioned over the 'Address *' field. At the bottom right of the form are three buttons: 'Reset Address', 'Remember This Address', and 'Complete'. Below these buttons is a checkbox labeled 'Customer Paperwork Required' which is checked.

When you rectify the missing or invalid data the orange circles disappear.

The screenshot shows the same delivery form as above, but with the errors resolved. The 'Company Name or Individual *' field now contains 'Manning Supplier Ltd' and the 'Address *' field contains 'The Fort'. The orange exclamation mark icons are no longer present. The 'Street' dropdown menu still shows 'MANNING', 'CORK', 'CORK', and 'IRL'. The 'Contact', 'Phone Number', and 'Email' fields are empty. The 'Reset Address', 'Remember This Address', and 'Complete' buttons are still present at the bottom right, along with the checked 'Customer Paperwork Required' checkbox.

You have the option to save this address for future use, by simply clicking **Remember This Address**. If you are updating a previously **Saved Address**, you will see all your previously saved details populated.

The screenshot shows the address form with the following pre-filled data:

- Search bar: MANNING (IRL)
- Company Name or Individual *: Manning Supplier Ltd
- Address *: The Fort, Street, MANNING, CORK, CORK, IRL
- Account Code *: MAN
- Account Name *: Manning Supplier Ltd
- Default Service: --- Select a Default Service ---
- Default Unit: --- Select a Default Unit ---
- Select address type: Collection Address, Delivery Address

Buttons at the bottom: **Reset Address**, **Do Not Remember This Address**, **Save and Complete**. A checkbox for **Customer Paperwork Required** is checked.

For a new address, the fields will be empty.

The screenshot shows the address form with the following empty fields:

- Search bar: MANNING (IRL)
- Company Name or Individual *: Manning Supplier Ltd
- Address *: The Fort, Street, MANNING, CORK, CORK, IRL
- Account Code *: (empty)
- Account Name *: (empty)
- Default Service: --- Select a Default Service ---
- Default Unit: --- Select a Default Unit ---
- Select address type: Collection Address, Delivery Address

Buttons at the bottom: **Reset Address**, **Do Not Remember This Address**, **Save and Complete**. A checkbox for **Customer Paperwork Required** is checked.

As a minimum requirement you will need to enter an **Account Code** and **Account name**(remember these will be used to search for this address in future use. This would generally be what you save your customers account code and account name).

Optionally you can add a **Default Service**, **Default Surcharges**, a **Default Unit**, and default address notes. These would then pre-populate the service and surcharge options if this is used as a delivery address, and relevant notes during consignment entry. ****Once you have completed the desired options ensure you click Save & Complete.**

Correct An Invalid Address

In recent updates, validation on addresses has been implemented so that addresses are routed correctly. It may be that some of your account addresses do not pass the validation and need correction.

Saved Address

You can edit Saved Addresses as you enter a consignment. To do this search for you address (as mentioned above). When the information is loaded into the form, you will notice there are **Orange Exclamation Circles**, notifying you of the issue. Amend the fields in error, and once correct click **Remember this Address**.

Home > Enter Jobs

Delivery Reverse Collection Third Party

COLLECTION

Collection Date * 11/07/2019 Collection Time Goods ready at

Enter Account Code / Name or Postcode to search for an address.
Man City

Company Name or Individual * Man City Contact

Address *
House No. / Property Name * ROWSLEY STREET
BURNLEY
LANCASHIRE
M11 3FF
GBR

Phone Number
Email

Reset Address Remember This Address Complete

Customer Paperwork Required

The postcode 'M11 3FF' doesn't match the city 'NURN', our records show this postcode is located in (MANCHESTER)

The postcode 'M11 3FF' doesn't match the city 'BURNLEY', our records show this postcode is located in (MANCHESTER)

*Postcodes for 'BURNLEY' are (BB10, BB11, BB12)

Once you have confirmed all details are correct, click **Save and complete**. The next time you select this address your changes will have been saved and your address will pass validation.

Enter Account Code / Name or Postcode to search for an address.

Man City

Company Name or Individual * Man City **Contact** Paul

Address * Ethad Stadium
ROWSLEY STREET
MANCHESTER
LANCASHIRE
M11 3FF
GBR

Phone Number 01827310189 **Email** david.fisher@vigosoftware.com

Account Code * MCF **Account Name *** Man City

Default Service Economy

Default Timed Surcharge - Anytime (From 09:00 - 17:00)


Default Non Timed Surcharge BI - Book In

Default Unit PT - PALLETS

Select address type Collection Address Delivery Address

Default Address Notes

Site Address

You can edit your site address by navigating to Saved Addresses page, click on the  icon in the menu. Locate your address by either searching for your **Account Code** in the **Search Box**, clicking actions and then **Edit**.

The screenshot shows the 'View Addresses' page with an 'Add Address' button. A search box contains 'sup001'. Below the search box is a table with columns 'Code' and 'Name'. Three rows are visible, all with 'SUP001' in the 'Code' column and 'SUPPLY CHAIN LIMITED' in the 'Name' column. To the right of the table is an 'Actions' menu with 'Edit' and 'Delete' options. The 'Edit' option is highlighted with a red box.

Or by clicking **Add Address** and searching by the **Site Address Postcode**.

The screenshot shows the 'Add Address' form. At the top, there is a search box with the placeholder text 'Enter Account Code / Name or Postcode to search for an address.' Below this is a dropdown menu showing search results for 'ox2 8dr'. The dropdown is highlighted with a red box. The search results are:

- SUPPLY CHAIN LIMITED, UNITS 10-14, BANBURY ROAD, OXFORD, OXFORDSHIRE, OX2 8DR,
- SUPPLY CHAIN LIMITED, UNITS 10-14, BANBURY ROAD, OXFORD, OXFORDSHIRE, OX2 8DR,

 Below the dropdown are fields for 'County / State', 'Postcode *', 'Email', and 'GBR'. To the right of the search box are fields for 'Account Code *', 'Account Name *', 'Default Service', 'Default Unit', and 'Select address type' (with checkboxes for 'Collection Address' and 'Delivery Address'). At the bottom right are 'Reset Address' and 'Save' buttons.

Correct any validation issues, and then simply click **Save**. Your Address will then be free from validation errors when you next come to use it.